



MARKETING RESEARCH
FOUNDATION

MAPS TECHNICAL REPORT

January – December 2025

PLUS 94
RESEARCH

Contents

MRF Objectives and Business	5
The Core Business of the Company	5
Main Objectives.....	5
Ancillary Objectives.....	5
MRF Management	6
MRF Councils.....	6
MRF Contractor	6
Coverage and Layout of this Technical Report.....	7
Contact Details	7
Section A: Introduction and Key Definitions.....	11
1.0 Introduction.....	11
Naming of MRF MAPS® Releases.....	11
2.0 Special Notes	11
1. Age.....	11
2. Language	12
3. Population 2024	12
4. Radio Listenership	12
5. MRF MAPS® Research Universe	12
6. TV Viewership	12
7. Question R12 of the Face-to-Face.....	13
8. Question R17 of the Face-to-Face.....	13
3.0 Definition of Terms	13
1. Average Issue Readership (AIR)	14
2. Children's Primary Purchase Decision-Maker	14
3. Dip.....	14
4. Dwelling Unit	14
5. EA.....	14
6. Area Type.....	14
7. Home Language.....	15
8. Household	16
9. Household Income	16
10. Household Purchaser.....	16

11. Housing Unit	16
12. Income Midpoints	16
13. Internet	18
14. Large Item Decision-Maker	19
15. Level of Education	19
16. Life Stages.....	19
17. Mothers with Children	20
18. Multiple Households.....	20
19. Occupation	20
20. Out of Home	20
21. Province.....	20
22. Radio Listening	21
23. Readership	21
24. Read or Paged Through.....	21
25. South African Population	22
26. TV Viewing	22
27. Working Life	22
Section B: Research Universe, Weighting, and Sample	24
4.0 Universe	24
Population 2024	24
5.0 Weighting, Benchmarking, and Weighting Efficiency	25
Current Weighting Scheme.....	25
Achieved Weighting Efficiency	27
6.0 Sample	28
Sampling Methodology	28
Disproportional Stratified Sample	29
Population vs. Achieved Sample Proportions	30
National Sample Profile	30
Sample Profile [Eastern Cape].....	31
Sample Profile [Free State]	31
Sample Profile [Gauteng].....	32
Sample Profile [KwaZulu-Natal].....	32
Sample Profile [Limpopo]	33

Sample Profile [Mpumalanga].....	33
Sample Profile [Northern Cape]	34
Sample Profile [North West]	34
Sample Profile [Western Cape]	35
Achieved Sample: Interviews	35
Achieved Sample: Fully Completed Leave-Behind Questionnaires	36
Achieved Sample: Online Split Leave-Behind Questionnaires	36
Area Distribution	37
Respondent Profiles	37
Section C: Fieldwork	41
7.0 Fieldwork.....	41
The Interview	41
Fieldwork Summary	42
Substitution.....	45
Back-checking.....	46
Section D: Analysis and Results.....	48
8.0 Analysis and Results	48
Data Fusion	48
9.0 Segmentation	49
Socio-Economic Measure (SEM).....	49
Living Standards Measure (LSM)	49
Life Stages	50
Generations.....	50
Consumer Market Segmentation Tool	51
10.0 Confidence Levels	52
Example	53
Technical Note.....	53
Section E: Appendix	56
11.0 MAPS® Research Instruments	56
11.1 Questionnaire Changes/Additions	56
11.2 Fieldwork Areas	56
11.3 Defining the Metropolitan Boundaries for MAPS®	57

MRF Objectives and Business

The Core Business of the Company

The Marketing Research Foundation (MRF), an independent non-profit company, is tasked with facilitating, co-ordinating, and determining the joint industry consumer research needs of its stakeholders. This is accompanied by the duty to ensure that these needs are met within budget limitations, while maximising the accuracy, representativeness and modernity of the study.

The community of stakeholders includes, among others, marketers, the advertising, research companies, academic institutions, and other organisations that rely on large scale data for market analysis and decision making.

Main Objectives

The MRF's research content is multifaceted, and fairly comprehensive in nature. The resultant data is usable for targeting and segmentation of markets as well as to establishing, commissioning, and managing a comprehensive research tool. Characteristic demands on MAPS® relate specifically to valid, reliable, independent, transparent, and continual media, consumer, and product usage research. MAPS® is an objective mirror image of the South African consumers.

Ancillary Objectives

The ancillary objectives of the company are:

1. To co-ordinate joint industry research amongst the advertising, marketing, and media industries.
2. To investigate any research techniques, whether in practice or proposed, and to establish the degree of validity and reliability of the results obtained thereby; to seek improved methods in consumer behaviour and product usage research and to provide improved tools for targeting and segmentation of markets.
3. To act as a liaison between the advertising, marketing, and media industry and universities and media audience for demographic and product-usage research, as well as tools for targeting and segmentation of markets.
4. To arrange seminars and courses directly or indirectly sponsored by the Marketing Research Foundation on any or all aspects of MAPS® data and the utilisation thereof including tools for market sizing, targeting, and segmentation of markets.
5. To act as mouthpiece of the industry on matters pertaining to marketing, consumer behaviour, and product-usage research as well as tools for targeting and segmentation of markets.
6. To promote and maintain fair, reasonable, and proper standards of media, consumer behaviour, and product-usage research as well as targeting and segmentation tools.

7. To maintain and augment a library of information concerning media audience, product usage, and related research as well as on tools for targeting and segmentation of markets, and to make it accessible to members and students.
8. To do all such other acts including the publication, in print or electronic format, of books, memoranda, journals, magazines, circulars, reports, and any documents or databases as the Marketing Research Foundation may consider expedient to promote the interests of its members.
9. Likewise, to do all things and carry on any activity related, connected to, or associated with any of the above objects and purposes.
10. To finance the operations of the company by engaging in any relevant, lawful activity that may generate funding for the company.

MRF Management

The responsibility for the management of the MRF affairs rests with a board of directors, representing the members of the foundation. Specific member associations are the Marketing Association of South Africa, the Association for Communication and Advertising, and the Advertising Media Forum. The day-to-day operations of the organisation are discharged under the direction of the chief executive officer (CEO). The CEO reports to the MRF board through the board chairman.

MRF Councils

The MRF board of directors is the highest MRF authority. It consists of directors nominated by all MRF stakeholders, namely marketers and advertising agencies.

Much of the work done by the MRF is guided by a Research Committee, with work groups and an Advisory Council. The MRF Research Committee and Advisory Council is involved with guidance and decision-making regarding the direction of all research decisions. The Research Committee consists of representatives from the subscriber base and research experts from the broader industry. The Advisory Council consists of research experts from the industry who do not sit on the board or are members of the Research Committee. The committee and council's mandate is to advise the MRF Board on what research should be undertaken and, in instances where the necessary authority has been delegated to it, to decide on technical details. In addition, several research experts serve on this council to advise on market research best practice and ethics.

The MRF Board and the MRF Research Committee and Advisory Council operate on a voluntary basis.

MRF Contractor

The MRF MAPS® technical report, tabular electronic reports, datafiles, presentations, MAPS® questionnaire, products and activities questionnaire, and other interviewing material, including an interviewer instruction booklet, were prepared by the incumbent research agency, Plus 94 Research.

Coverage and Layout of this Technical Report

1. Introduction
2. Special Notes: It is important that this be read before studying the individual electronic reports.
3. Definition of Terms: Particular attention is directed to this section, since correct interpretation of the data in the numerous MAPS® tables naturally depends on a clear understanding of the terms used.
4. Universe: Details of the population sampled are provided.
5. Weighting: MAPS® current weighting scheme and the achieved weighting efficiency.
6. Sampling: The MAPS® sampling method and the actual sample obtained is provided.
7. The Interview: The MAPS® interview is described as well as questionnaire changes implemented.
8. Fieldwork: The fieldwork methods and the results obtained in terms of the original sample attained are discussed. EA substitution details and back-checking statistics.
9. Analysis: This covers the treatment of the data after completion of the interviewing.
10. Segmentation: This covers various segmentation tools including the Living Standards Measure.
11. Confidence Limits: The technical report concludes with the likely margins of error attached to the MAPS® data.
12. Appendix: The MAPS® research instruments [i.e., face-to-face questionnaire and leave-behind questionnaire], questionnaire changes/additions, fieldwork areas covered by the study.

Contact Details

The Marketing Research Foundation

54 Queens Road, Bryanston, 2191
Tel: 011 463 5340
mrf@mrfsa.co.za



Marié Rossouw

Project Manager

Tel: +27 11 463-5340/1/2
Fax: +27 86 635 3592
Email: marie@mrfsa.co.za
www.marketingresearchfoundation.co.za/

54 Queens Road
Bryanston
South Africa 2152



Johann Koster

Market Research Foundation CEO

Tel: +27 11 463-5340/1/2
Fax: +27 86 635 3592
Email: johann@mrfsa.co.za
www.marketingresearchfoundation.co.za/

54 Queens Road
Bryanston
South Africa 2152

Plus 94 Research

2 Albury Road, Dunkeld West

Tel: 011 327 2020

nubiz@plus94.co.za





MARKETING RESEARCH
FOUNDATION

Section A:

Introduction and Key Definitions

PLUS 94
RESEARCH

Section A: Introduction and Key Definitions

1.0 Introduction

MAPS® aims to be the consumer-centric barometer of the customer journey, tracking consumption and related product and brand information. The results of the survey are useful in consumer understanding for target marketing and target sizing, and act as the basis for planning media space and time.

The focus of the research is on product and brand consumption, media interaction, and consumer behaviour, but has been expressed broadly as surveys, investigations, and reports to allow for the best methods of collecting and reporting the information to be considered, with a view to establishing:

1. Consumption behaviour relating to purchase, usage, and ownership of products, services, and brands.
2. Comprehensive characteristics of users of products, services, brands, behaviour, and media that can be used for segmentation development, and defining a multitude of target groups, including living standards measures (LSMs), socio-economic measures (SEMs), lifestyles, and psychographics.
3. The usage of media (audience sizes and wide-ranging characteristics, including detailed demographics).

Naming of MRF MAPS® Releases

The descriptors for the various MRF MAPS® releases are as follows:

- The current release is described as MRF MAPS® January to December 2025. This covers the applicable timeframe.

2.0 Special Notes

1. Age

There is one age question in the MRF MAPS® questionnaire that captures the exact ages of the respondents. There is also a proportion of respondents who refuse to give their exact ages. Between July 2020 and December 2022, missing ages for respondents who were not willing to disclose their exact ages were imputed using relevant demographic variables such as age groups of own children. In January 2023, an additional question with five-year age bands was introduced to cater for such respondents. Numeric results are to be read against a targeted annual sample of 20000 respondents. A total of 19 respondents were not willing to disclose their exact ages (preferred to provide age bands); two respondents did not share their gender whilst all of them were comfortable with specifying their race during the MAPS® January – December 2025 fieldwork period. Midpoints of the chosen age bands were then imputed as the exact ages. For

example, a respondent who selects a 30-34 age band is automatically assigned an exact age of 32 years on question PD1 (*Would you mind telling me your exact age?*) when the imputation process is carried out.

2. Language

For reporting purposes, the language categories are as follows:

Afrikaans	Sesotho	Setswana
English	SiSwati	Tshivenda
IsiNdebele	Xitsonga	IsiZulu
Sepedi	IsiXhosa	Other

Each language code comprises only those respondents claiming that specific language as the language most spoken at home.

3. Population 2024

According to Statistics South Africa’s 2024 mid-year population estimates, the total population of South Africa was estimated to be at 63.02 million. Approximately 72.5% (45.69 million) of the population is aged 15 years and older and this defines the universe for the MAPS® study. About 9.7% (6.1 million) is 60 years and older, whereas 27.5% of the population is aged younger than 15 years. The data weighting process for the MAPS® January – December 2025 release was based on Stats SA’s 2024 mid-year population estimates.

4. Radio Listenership

To assist with intermedia comparisons, the “past four weeks”, “past seven days”, and “yesterday” radio listening questions are incorporated into the MRF MAPS® questionnaire. The radio currency is Broadcast Research Council (BRC) RAM data. BRC RAM is not a product of the MRF and is independently conducted by the BRC.

Radio stations with 40 or more mentions are released individually on the database for commercial, community, and online stations.

Refer to the questionnaire in the Appendix of this report for details of the radio station changes for MRF MAPS® January – December 2025.

5. MRF MAPS® Research Universe

The research universe is defined as adult males and females aged 15 years and older.

6. TV Viewership

To assist with intermedia comparisons, the “past four weeks”, “past seven days”, and “yesterday” TV viewing questions are incorporated into the MRF MAPS® questionnaire. The TV currency is BRC TAMS data. BRC TAMS is not a product of the MRF and is independently conducted by the BRC.

The figures for SABC 1, SABC 2, SABC 3, e.tv, M-Net, and community TV reflected in the electronic reports and on the database still reflect total viewership for these stations regardless of the platform through which they are viewed. “Total Community TV” currently includes Soweto TV, Cape Town TV, Bay TV, Tshwane TV, 1KZNTV, and Platinum TV.

TV channels with 40 or more mentions are released individually on the database.

Refer to the questionnaire in the Appendix of this report for details of all TV station/channel changes for MRF MAPS® January – December 2025.

7. Question R12 of the Face-to-Face

Question: *What is your occupation? (What type of work do you do?)*

There were some respondents who listed various elementary jobs that were coded as “general hand worker” in the data.

“General hand worker” refers to the following occupations:

1. General worker
2. Maintenance/recycling/street cleaner/municipal worker
3. Car guard
4. Ordinary labourer
5. Gardener
6. Farmworker

8. Question R17 of the Face-to-Face

Please note that the diploma qualification **excludes short courses** as these are covered by options 6 and 7.

1. No schooling
2. Some primary school
3. Primary school completed
4. Some high school
5. Matric (high school completed)
6. Pre-matric certificate
7. Post-matric certificate
8. Diploma
9. Undergraduate degree
10. Postgraduate degree

3.0 Definition of Terms

In a study of this magnitude, it is important that certain user-terms are defined and agreed upon. This has a bearing on how the respondents are filtered. The MRF reserves all rights to provide such definitions and to modify them from time to time as may become necessary. Changes in the definitions

are then incorporated into the questionnaire to modify the manner in which respondents are screened and their data interpreted. Below is a summary of the list of working definitions as they are currently used in the survey:

1. Average Issue Readership (AIR)

To qualify as an “average issue” reader of a publication, a respondent must have read or paged through any copy of the title under consideration within a period before the interview which is no longer than the issue period of that title. Furthermore, the respondent must have read or paged through that issue for the first time within that period.

For example, to qualify as an average issue reader of a weekly publication, a respondent must have read or paged through that issue for the first time within the past seven days.

2. Children’s Primary Purchase Decision-Maker

“Primary purchase decision-maker for babies” refers to infants up to 23 months old, and “primary purchase decision-maker for children” refers to children from two to 14 years old.

A primary purchase decision-maker for children is a person (male or female) who decides upon or chooses the products or services for children. These children can be his/her own children or other children who are dependent on him/her. It does not matter whether these children live with the person who primarily makes decisions for their purchases.

3. Dip

A dip is a monthly survey of 1 667, which over 12 months equals 20 004 interviews.

4. Dwelling Unit

Structure or part of a structure or group of structures occupied or meant to be occupied by one or more than one household. Includes structure or part of a structure that is vacant and/or under construction but can be lived in at the time of the survey.

5. EA

EA is an abbreviation for an enumeration or enumerator area. It is a pocket-sized piece of a country that is visited by an enumerator during a census. In the MAPS® study, EA maps are made use of by interviewers for ease of identifying the areas selected for the survey.

6. Area Type

The definition of metropolitan areas in the MAPS® study differs from the official metropolitan municipality classification used by Statistics South Africa. According to MAPS® and AfricaScope, metropolitan areas are defined primarily on the basis of contiguous built-up urban development rather than on administrative or municipal boundaries. This means that only the continuously urbanised or densely built-up sections of a metro are classified as metropolitan areas within the study framework.

As a result, peri-urban, semi-rural, or rural areas that may fall within the official boundaries of a metropolitan municipality are excluded from the MAPS® metropolitan classification if they are not part of the continuous urban settlement pattern. The approach is intended to provide a more functionally urban definition of metro areas that better reflects population concentration, urban lifestyles, media access, and consumer behaviour patterns relevant to market research and audience measurement.

Metro: Areas that fall under a **metropolitan municipality as per the official demarcation of municipalities**. The area might be a city, e.g., Johannesburg under the City of Johannesburg Metropolitan Municipality, or a town, e.g., Centurion under the City of Tshwane Metropolitan Municipality, or just a township, e.g., KwaThema in Ekurhuleni Metropolitan Municipality. There are eight metropolitan municipalities and they are as follows:

1. City of Johannesburg Metropolitan Municipality;
2. City of Tshwane Metropolitan Municipality;
3. Ekurhuleni Metropolitan Municipality;
4. eThekweni Metropolitan Municipality;
5. Nelson Mandela Bay Metropolitan Municipality;
6. City of Cape Town Metropolitan Municipality;
7. Mangaung Metropolitan Municipality; and
8. Buffalo City Metropolitan Municipality.

Urban: **Urban areas that fall under a local or district municipality** as per the official demarcation of municipalities. The area might be a large town, e.g., Polokwane under the Polokwane Local Municipality, or a small town, e.g., Krugersdorp under West Rand District Municipality.

Rural: **Farms and traditional areas that fall under a local and district municipality** as per the official demarcation of municipalities.

Stats SA provides a list of areas with classifications showing if an area is urban or rural, or if it falls under a metropolitan municipality or not. Sometimes there are fine margins, hence we carefully define each area type. For example, some areas in Westonaria on the West Rand are classified under “urban” while others fall under “rural”. An informal settlement may fall under “metro”, “urban”, or “rural” as well.

Refer to the Appendix (Section E) of this technical report for more information about area types.

7. Home Language

The respondent is asked for the language they personally speak most often at home. If the respondent cannot decide on one home language, they are asked for the language they spoke most often the previous day.

All 11 official languages are used as breakdowns in the electronic reports as follows:

Afrikaans	Sesotho	Tshivenda
English	SiSwati	IsiXhosa
IsiNdebele	Xitsonga	IsiZulu
Sepedi	Setswana	Other

8. Household

A household consists of a person, or a group of persons, who occupy a common dwelling (or part of it) for at least four days a week and who provide themselves jointly with food and other essentials for living. In other words, they live together as a unit. People who occupy the same dwelling, but who do not share food or other essentials, are enumerated as separate households. For example, people who share a dwelling, but who buy food and eat separately, are counted as separate households. Resident domestic workers and live-in gardeners are, however, excluded and regarded as forming a household of one or more persons.

9. Household Income

“Household income” is defined as the “total monthly income” of the number of “income earners” previously enumerated within the relevant household “before tax and other deductions”, but including “all sources of income, e.g., salaries, pensions, government grants, income from investments, etc.”

In the cases of refusal to answer the question, the income is imputed using broader income brackets that were incorporated into the MAPS® face-to-face questionnaire in January 2023. About 5.7% of the respondents refused to provide either their household income or personal income as they deemed this type of question to be of a sensitive nature, while 20.4% of the respondents mentioned that they did not have the knowledge of their household income during the MAPS® January – December 2025 fieldwork period. Data imputation was implemented to help close this gap in income.

10. Household Purchaser

Any respondent of either gender who claims to be solely or partly responsible for the day-to-day purchases of the household is described as a household purchaser (see the face-to-face questionnaire in the Appendix of this report, question M1).

These respondents are weighted to households and used for analyses on the household FMCG categories.

There may be more than one person who could claim to be a “household purchaser” within any given household, although only one is interviewed.

11. Housing Unit

A unit of accommodation for a household may consist of one structure, or more than one structure, or part of a structure. (Examples of each are a house, a group of rondavels, and a flat.) It may be vacant or occupied by one or more than one household.

12. Income Midpoints

Multiple defined income bands are used to collect monthly gross household and personal income data from respondents using questions R20 and R21 in the MAPS® face-to-face questionnaire. This approach offers respondents an easier way to answer delicate personal questions. To enable the

calculation of average or mean income, midpoints based on the selected income bands are then assigned to each respondent. The midpoints are assigned as follows:

Household Income Band	Midpoint
R1-R499	R250
R500-R599	R550
R600-R699	R650
R700-R799	R750
R800-R899	R850
R900-R999	R950
R1 000-R1 099	R1 050
R1 100-R1 199	R1 150
R1 200-R1 399	R1 300
R1 400-R1 599	R1 500
R1 600-R1 999	R1 800
R2 000-R2 499	R2 250
R2 500-R2 999	R2 750
R3 000-R3 999	R3 500
R4 000-R4 999	R4 500
R5 000-R5 999	R5 500
R6 000-R6 999	R6 500
R7 000-R7 999	R7 500
R8 000-R8 999	R8 500
R9 000-R9 999	R9 500
R10 000-R10 999	R10 500
R11 000-R11 999	R11 500
R12 000-R13 999	R13 000
R14 000-R15 999	R15 000
R16 000-R19 999	R18 000
R20 000-R24 999	R22 250
R25 000-R29 999	R27 250
R30 000-R39 999	R35 000
R40 000-R49 999	R45 000
R50 000-R59 999	R55 000
R60 000-R69 999	R65 000
R70 000-R79 999	R75 000
R80 000-R89 999	R85 000
R90 000-R99 999	R95 000
R100 000-R109 999	R105 000
R110 000-R119 999	R115 000
R120 000+	R200 000

Personal Income Band	Midpoint
No personal income	R0
R1-R499	R250
R500-R599	R550
R600-R699	R650
R700-R799	R750
R800-R899	R850
R900-R999	R950
R1 000-R1 099	R1 050
R1 100-R1 199	R1 150
R1 200-R1 399	R1 300
R1 400-R1 599	R1 500
R1 600-R1 999	R1 800
R2 000-R2 499	R2 250
R2 500-R2 999	R2 750
R3 000-R3 999	R3 500
R4 000-R4 999	R4 500
R5 000-R5 999	R5 500
R6 000-R6 999	R6 500
R7 000-R7 999	R7 500
R8 000-R8 999	R8 500
R9 000-R9 999	R9 500
R10 000-R10 999	R10 500
R11 000-R11 999	R11 500
R12 000-R13 999	R13 000
R14 000-R15 999	R15 000
R16 000-R19 999	R18 000
R20 000-R24 999	R22 250
R25 000-R29 999	R27 250
R30 000-R39 999	R35 000
R40 000-R49 999	R45 000
R50 000-R59 999	R55 000
R60 000-R69 999	R65 000
R70 000-R79 999	R75 000
R80 000+	R150 000

13. Internet

The Internet is introduced to respondents as an alternative means of communication, and that it can be accessed using a computer, cellular phone, or another Internet-enabled device.

14. Large Item Decision-Maker

To analyse the incidence, usage, and purchase of large household items, a male or female respondent who claims to be the head of the household or who claims to be solely or partly responsible for the household purchases is described as a “large item decision-maker”.

15. Level of Education

Respondents still undergoing full-time education are coded according to the level achieved as at the date of the interview.

16. Life Stages

Seven personal life stage groups are used as a breakdown and are included on the database. A description of these groups follows. Unless otherwise stated, a child is under 21 years of age.

Young Singles

1. Up to 34 years old;
2. Not married or not living together; and
3. Does not have any dependent children in the household (own or other children) that the respondent is responsible for.

Mature Singles

1. 35+ years old;
2. Not married or not living together; and
3. Does not have any dependent children in the household (own or other children) that the respondent is responsible for.

Young Couples

1. Up to 49 years old;
2. Married or living together; and
3. No dependent children in the household (own or other children) that they are responsible for.

Mature Couples

1. 50+ years old;
2. Married or living together; and
3. No dependent children in the household (own or other children) that they are responsible for.

Young Family

1. Married or living together; and
2. With at least one dependent child under 13 years in the household (own or other children) that they are responsible for.

Single-Parent Family

1. Not married or not living together; and

2. With dependent children in the household (own or other children) that they are responsible for.

Mature Family

1. Married or living together; and
2. With no dependent children under 13 years in the household (own or other children) that they are responsible for, but with dependent children over the age of 13 years in the household.

17. Mothers with Children

“With babies” refers to infants up to 23 months old. “With children” refers to children in the age group from 24 months to 14 years.

18. Multiple Households

Two or more households living in the same dwelling unit.

19. Occupation

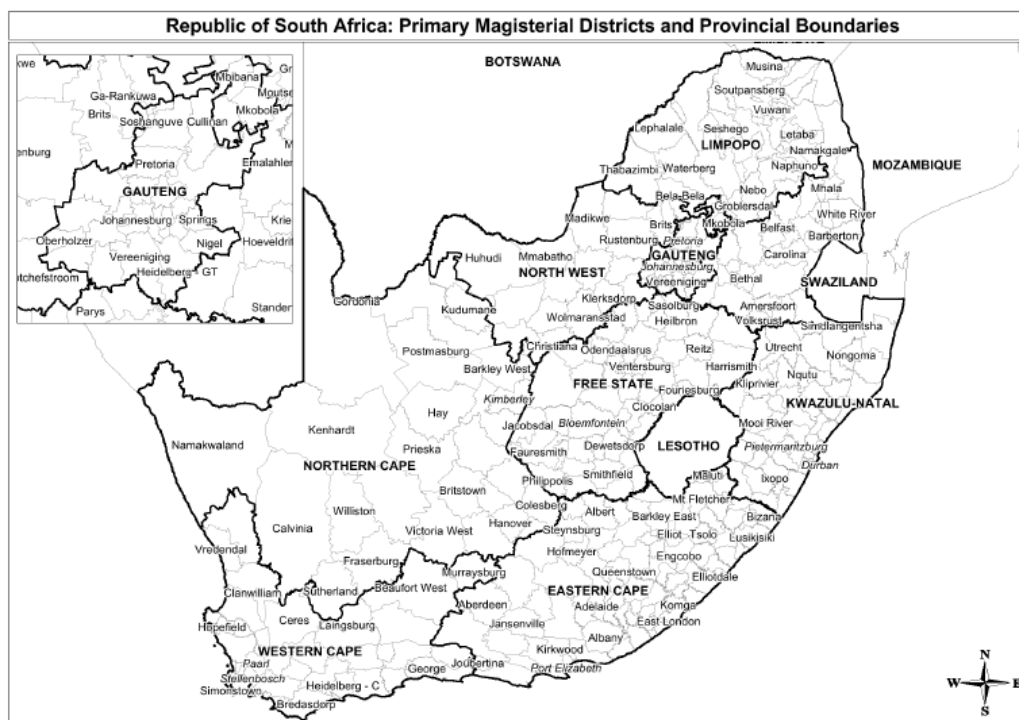
The occupation of respondents who work full-time or part-time or are self-employed is classified according to Stats SA’s “Standard Classification of Occupations” (Report 09-90-01) down to the level of unit groups (three-character codes). These appear on the database. (See Appendix of this report.) Note that the abbreviation “n.e.c.” used throughout the occupation classification list stands for “not elsewhere classified”.

20. Out of Home

“Out of Home” media exposure covers billboards, digital screens, branding on the inside and outside of buses and taxis, signs on building wraps/construction site wraps, dustbins, and street poles. Travel outside of home is measured by duration, destination, and mode of travel.

21. Province

The nine province boundaries used in the MAPS® sample coincide with those of Stats SA. The following map shows the boundaries of the provinces in terms of magisterial districts.



22. Radio Listening

“Radio listening” refers to personally listening to all or part of a programme on a radio, computer, cell phone, television, satellite service, or any other device. The location where the listening took place is not relevant.

While the MAPS® study measures radio audience via one of its research instruments, it is critical to note that the Broadcast Research Council Radio Audience Measurement (BRC RAM) is a media buying currency.

23. Readership

All references to numbers of readers imply estimates of the “average issue readership” of the publication concerned.

24. Read or Paged Through

To have “read or paged through” is explained to the respondent as meaning that he/she has “... read or paged through all or part of a copy, including any of the separate parts, sections or supplements that may come with it. It does not matter if it was an own copy or someone else’s copy, or where it was read or paged through. It also does not matter if it was purchased personally or purchased by someone else, or whether it was received free of charge at home or elsewhere.”

25. South African Population

The total population of the country is based on the official population according to Stats SA. Stats SA is currently using the cohort-component methodology to estimate the mid-year population. This refers to the population as it stands during the month of June. The adjusted population estimates are released by Stats SA in July of each year.

26. TV Viewing

“TV viewing” is defined as “... you personally have watched all or part of a programme. It does not matter where it was watched. This could be at home or elsewhere.”

Note that the currency for TV viewing is as defined by BRC TAMS.

27. Working Life

Unemployed: Any person that does not have a job and is actively looking for employment (this also includes individuals that have never worked before and are actively looking for jobs, e.g., matric graduate job seekers, university graduate job seekers, etc.).

Not working: Discouraged work seekers who are no longer actively looking for employment or anyone who is not actively looking for employment (this excludes housewives/househusbands, students, and retired people, as these categories have their own pre-codes (classification) in the questionnaire).

It should be noted that MAPS measures all income-earning respondents, regardless of whether their income is generated through formal employment, informal employment, self-employment, or other forms of economic activity.



MARKETING RESEARCH
FOUNDATION

Section B:

Research Universe,
Weighting, and
Sample

PLUS 94
RESEARCH

Section B: Research Universe, Weighting, and Sample

4.0 Universe

The target population for the research is individuals aged 15 years and older in South Africa. The following was used to filter the broad audience base of the respondents:



- Gender: Both males and females
- Race: All racial groups
- Area: National (all nine provinces)

Population 2024

According to Statistics South Africa's 2024 mid-year population estimates, the total population of South Africa was estimated to be at 63.02 million. Approximately 72.5% (45.69 million) of the population is aged 15 years and older and this defines the universe for the MAPS® study. About 9.7% (6.1 million) is 60 years and older, whereas 27.5% of the population is aged younger than 15 years. The data weighting process for the MAPS® January – December 2025 release was based on Stats SA's 2024 mid-year population estimates.

The table below summarises the adult population in the nine provinces based on Statistics South Africa's 2024 mid-year population estimates:

Province	Adult Population (15 years+)	% of Population
Eastern Cape	4 901 452	11%
Free State	2 202 995	5%
Gauteng	12 245 493	27%
KwaZulu-Natal	8 600 085	19%
Limpopo	4 283 735	9%
Mpumalanga	3 650 730	8%
Northern Cape	977 802	2%
North West	2 995 182	7%

Western Cape	5 831 072	13%
Total	45 688 545	100%

Gender (15 years+)

Gender	Count	Percentage (%)
Female	23 578 747	52%
Male	22 109 798	48%
Total	45 688 545	100%

Race (15 years+)

Race	Count	Percentage (%)
Black African	36 380 108	80%
Coloured	4 041 343	9%
Indian/Asian	1 362 216	3%
White	3 904 878	9%
Total	45 688 545	100%

Source: Statistics South Africa, Statistical Release P0302, Mid-year population estimates

5.0 Weighting, Benchmarking, and Weighting Efficiency

Current Weighting Scheme

The sample data is benchmarked against the South African population of 15 years and older. The Statistics South Africa (Stats SA) mid-year population estimates are used for this benchmarking process. Previously (from July 2020 to December 2024), the weighting scheme for the MAPS® data incorporated age, gender, race, province, area type, and employment status as weighting variables. However, as of January 2025 the employment status variable was removed from the weighting scheme as per the recommendations obtained from the 3m3a auditors and the Marketing Research Foundation (MRF).

Stats SA does not provide mid-year estimates for the area type (viz., metro, urban, and rural) split. Therefore, a demographer from AfricaScope estimates the area type split and the racial distribution per province, which are critical in the benchmarking process. For household weights, benchmarking using household population totals by province is conducted to provide benchmarked household weights. The weighting is done based on fixed five-year age bands, four race groups, the male or female gender, three area types, the nine provinces, and level of education.

RIM Weighting Using the ANESrake Approach

RIM weighting was run using the ANESrake package in R <https://cran.r-project.org/web/packages/anesrake/anesrake.pdf>. This is a package used by the American National Election Studies in a number of other weighting setups, mostly because it is easy to use and well documented. The resultant weights were projected so that it summed up to the national population (45 688 545).

Weighting data is a crucial step in survey analysis to ensure representative results. In some cases, there may be insufficient sample sizes within certain subgroups of the population. To address this issue and improve weighting efficiencies, the RIM (random iterative method) weighting technique was employed for the MRF MAPS® January – December 2025 data release. This approach, implemented using the ANESrake package in R, allows for the interlacing and collapsing of certain weighting variables, such as age, gender, race, education level, area type, and province. Interlacing variables refers to combining or interweaving certain weighting variables when insufficient sample sizes are available within particular subgroups of the population. By interlacing variables such as age, gender, race, education level, area type, and province, the RIM weighting process can capture the joint distribution of these variables more effectively.

RIM Weighting Process

The RIM weighting technique is used to generate accurate weights that align the sample with the target population. The ANESrake package in R provides a user-friendly implementation of this method. The steps involved in the RIM weighting process using ANESrake are as follows:

1. **Identify the Target Population:** Define the population that the survey aims to represent accurately. This population is often characterised by demographic and geographic variables, such as age, gender, race, education level, area type, and province.
2. **Calculate Population Totals:** Obtain population totals for each combination of the identified weighting variables from external data sources, such as census or survey data. These population totals represent the known distribution of the target population.
3. **Prepare the Survey Data:** Ensure that the survey data includes the required variables for weighting, aligning them with the identified weighting variables in the target population. While it is necessary to incorporate all the specified variables in the weighting process, it is important to note that attempting to align the data to every single variable may lead to excessive strain on certain weights, resulting in extremely small or large values. Therefore, depending on the structure of the data, it may be appropriate to exclude certain variables from the weighting procedure.
4. **Initialise the Weighting Process:** Set an initial set of weights for each survey respondent. These initial weights are usually set to 1.
5. **Start Iterative Process:** Begin the iterative process to update the weights based on the target population distribution. The ANESrake package employs an iterative proportional fitting (raking) algorithm to adjust the weights.
6. **Perform Iterative Proportional Fitting:** In each iteration, ANESrake adjusts the weights to minimise the differences between the survey data and the target population distribution. The package uses the

raking algorithm, which iteratively redistributes the weights based on the joint distribution of the weighting variables.

7. Assess Convergence: Monitor the convergence of the iterative process to ensure stability in the weights. The process typically continues until a predetermined convergence criterion is met.

8. Finalise the Weights: Once the iterative process converges, the final weights are obtained. These weights represent the adjusted values that align the survey data with the target population.

Achieved Weighting Efficiency

High weighting efficiencies in survey data analysis offer several advantages, ensuring accurate representation and reliable results. The benefits of high weighting efficiencies include improved representativeness, reduced bias, enhanced precision, and robust statistical analysis. It is generally recommended to aim for a minimum weighting efficiency of 70% to maintain data quality and integrity. This minimum threshold ensures that the weighted data adequately reflects the target population. The overall individual efficiency achieved for the MAPS® January – December 2025 data was 74.57%. It was above the expected minimum individual efficiency of 70%.

Province	Achieved Individual Weighting Efficiency (%)	Achieved Household Weighting Efficiency (%)
Eastern Cape	60.57%	100%
Free State	64.96%	100%
Gauteng	84.20%	100%
KwaZulu-Natal	59.98%	100%
Limpopo	89.63%	100%
Mpumalanga	89.91%	100%
North West	83.51%	100%
Northern Cape	89.56%	100%
Western Cape	78.94%	100%
Overall	74.57%	98.76%

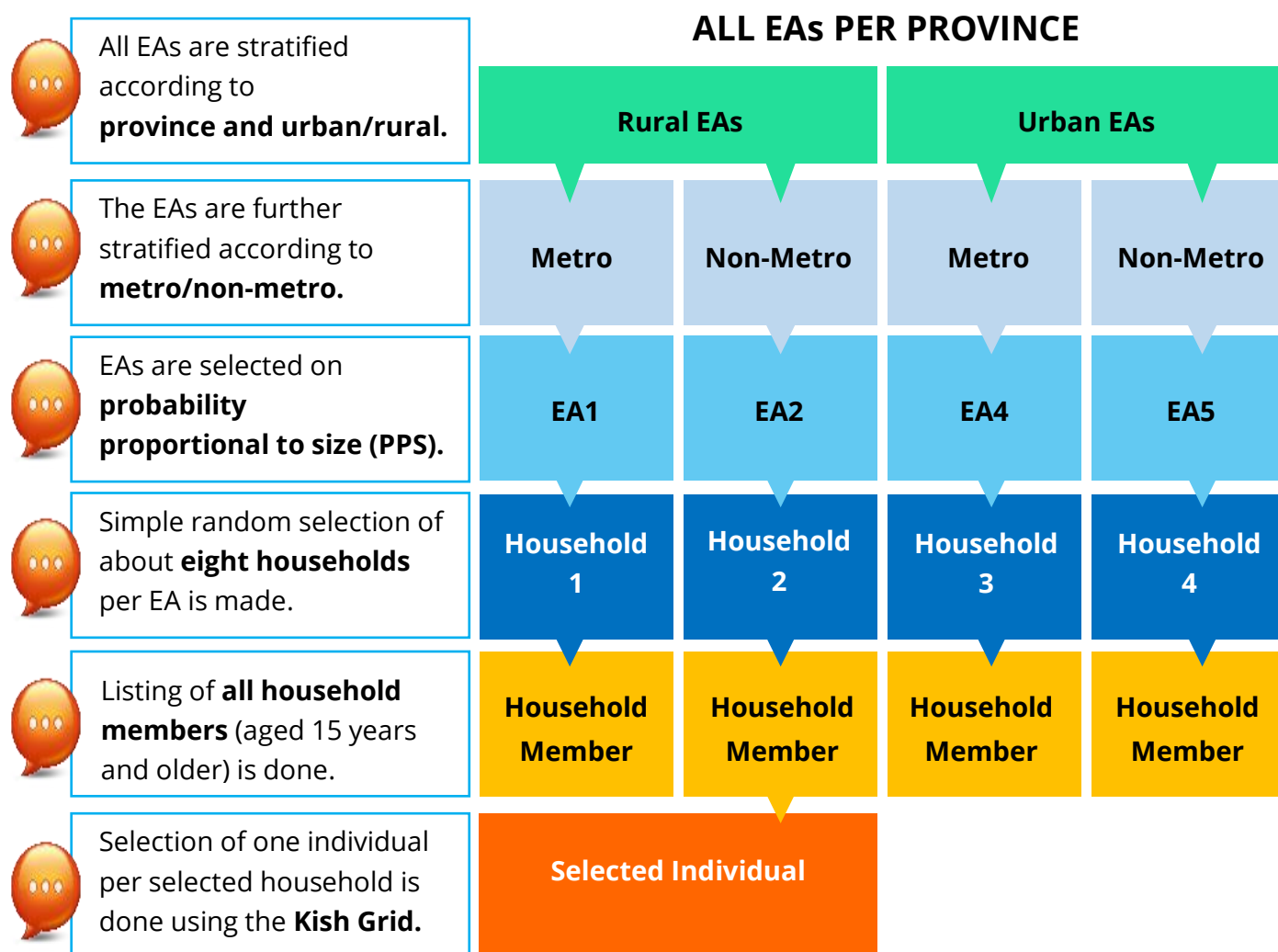
The low weighting efficiencies for KwaZulu-Natal, Eastern Cape, and Free State were primarily caused by large discrepancies between the achieved sample distribution and the target sample which could have been a chance variation due to a combination of sampling and non-sampling errors. These discrepancies forced the raking algorithm to apply large adjustment factors, increasing weight variability and reducing efficiency.

For Eastern Cape and KwaZulu Natal sample variability against the normal distribution were corrected when applying the correct population weights. Small sample sizes in the Free State accounted for some instability within sub-sample cells.

6.0 Sample

Sampling Methodology

The sampling methodology is area-stratified, multi-stage probability sampling. The Stats SA 2022 census data enumeration areas (EAs) are used as the sampling frame. EAs are drawn using a “probability proportional to population size” (PPS) approach. The EAs are the primary sampling units (PSUs), and the households are the secondary sampling units (SSUs). The stratification is based on the number of households per strata (province, rural/urban, metro/non-metro). The image below illustrates the sampling procedure for the MAPS® study:



EAs that were 100% in the military barracks were removed from the sampling frame before selection. Prisons, hospitals, industrial areas, cemeteries, and resorts were excluded from the survey. EAs that constitute these areas were only included if there was a residential component in the EA.

Professor Khangelani Zuma was responsible for drawing the EA sample for the MAPS® study. Under his guidance, AfricaScope provided Plus 94 Research with the EA maps based on the drawn EA sample. Each map had 12 household locations/points that were randomly selected and assigned numbers from 1 to 12 along with the exact GPS co-ordinates for each point. Plus 94 Research fieldworkers were required to interview eight respondents from households 1 to 8 in each EA if there was no household replacement in an EA. The other four additional points (labelled 9, 10, 11, and 12) were used as replacement households where refusals were encountered with any of the respondents from households 1 to 8. To ensure a wide geographic spread of points, all the randomly selected 12 points within an EA were physically spaced to such an extent that the majority of the enumeration area was satisfactorily covered. The spread also ensured that all possible demographic profiles of respondents in every EA had a fair chance of participating in the MAPS® study. Refer to the Appendix of this report to obtain finer details on the areas [province, district, municipality, main place name, sub-place name, and area type (viz., metro, urban, and rural)] that were covered by the MAPS® study between January and December 2025.

Half of the total sample of the MAPS® face-to-face interview respondents were expected to complete the leave-behind questionnaire.

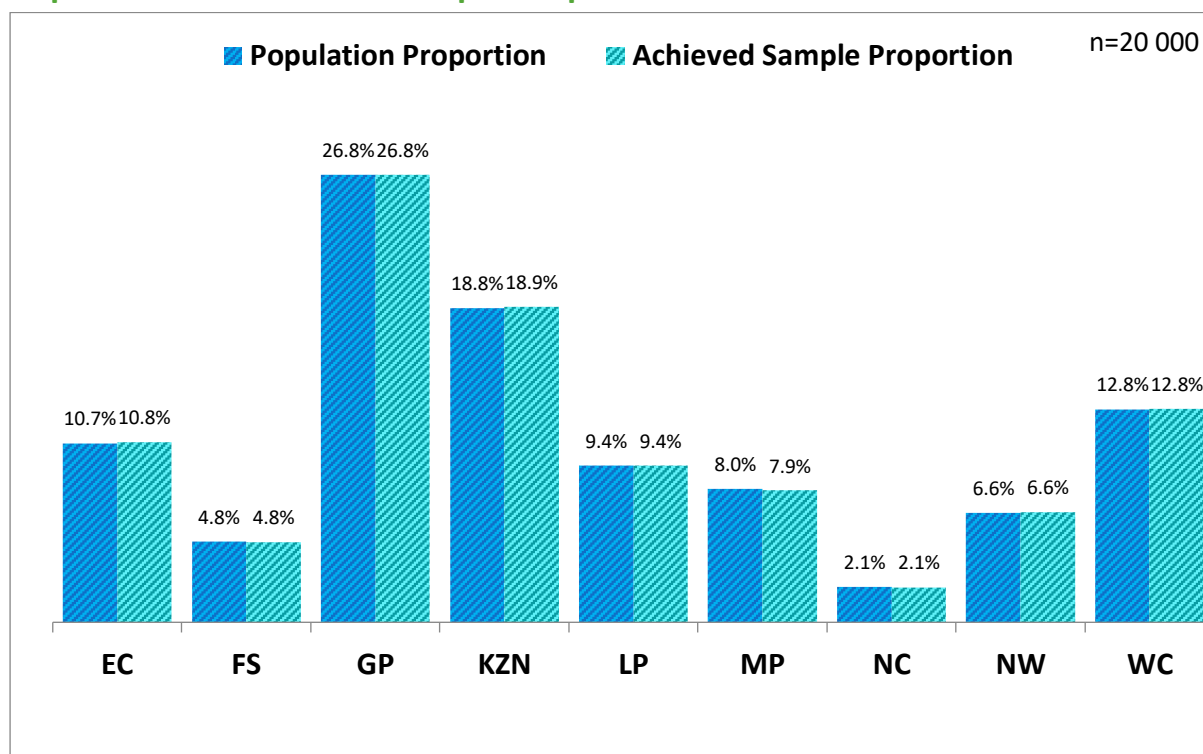
Disproportional Stratified Sample

Disproportional stratified sampling is a stratified sampling procedure in which the number of elements sampled from each stratum is not proportional to their representation in the total population. Population elements are not given an equal chance to be included on the sample. This sampling procedure helps improve precision at stratum (reporting domain) level by increasing sample size/allocation to smaller strata and decreasing the sample size to larger strata. In order to ensure a disproportionate sample for the MAPS® study, the sample is structured as follows, taking into account the multi-stage stratified sampling approach:

- a) **50% metro area EAs**
- b) **30% large, medium, and small urban EAs**
- c) **20% rural EAs**

A disproportionate stratified sample was applied in order to boost samples in urban and metro areas.

Population vs. Achieved Sample Proportions



National Sample Profile

	January to December 2025 [Unweighted Data]								Total
	Jan – Mar '25	%	Apr – Jun '25	%	Jul – Sept '25	%	Oct – Dec '25	%	
Total	5000	25%	5000	25%	5000	25%	5000	25%	20 000
Female	2 676	54%	2 546	51%	2 563	51%	2 569	51%	10 354
Male	2 324	46%	2 454	49%	2 437	49%	2 431	49%	9 646
Black	3 888	78%	3 693	74%	3 856	77%	3 787	76%	15 224
White	358	7%	501	10%	571	11%	443	9%	1 873
Indian/Asian	171	3%	149	3%	114	2%	190	4%	624
Coloured	583	12%	657	13%	459	9%	580	12%	2 279
15-24	934	19%	887	18%	1 033	21%	978	20%	3 832
25-34	1 380	28%	1 421	28%	1 403	28%	1350	27%	5 554
35-44	1 112	22%	1 205	24%	1 241	25%	1176	23%	4 734
45-54	674	13%	699	14%	620	12%	676	13%	2 669
55-64	528	11%	441	9%	393	8%	453	9%	1 815
65-74	267	5%	258	5%	245	5%	284	6%	1 054
75+	105	2%	89	2%	65	1%	83	2%	342

Sample Profile [Eastern Cape]

	January to December 2025 [Unweighted Data]								Total
	Jan – Mar '25	%	Apr – Jun '25	%	Jul – Sept '25	%	Oct – Dec '25	%	
Total	536	25%	544	25%	536	25%	544	25%	2 160
Female	315	59%	294	54%	294	55%	295	54%	1198
Male	221	41%	250	46%	242	45%	249	46%	962
Black	425	79%	425	78%	457	85%	466	86%	1773
White	24	5%	21	4%	23	4%	16	3%	84
Indian/Asian	0	0%	2	0%	0	0%	0	0%	2
Coloured	87	16%	96	18%	56	10%	62	11%	301
15-24	92	17%	79	15%	69	13%	85	16%	325
25-34	112	21%	135	25%	130	24%	142	26%	519
35-44	101	19%	131	24%	135	25%	120	22%	487
45-54	79	15%	93	17%	93	17%	83	15%	348
55-64	83	15%	59	11%	59	11%	62	11%	263
65-74	46	9%	33	6%	38	7%	42	8%	159
75+	23	4%	14	3%	12	2%	10	2%	59

Sample Profile [Free State]

	January to December 2025 [Unweighted Data]								Total
	Jan – Mar '25	%	Apr – Jun '25	%	Jul – Sept '25	%	Oct – Dec '25	%	
Total	240	25%	240	25%	240	25%	240	25%	960
Female	122	51%	121	50%	122	51%	123	51%	488
Male	118	49%	119	50%	118	49%	117	49%	472
Black	218	91%	182	76%	218	91%	190	79%	808
White	10	4%	17	7%	5	2%	39	16%	71
Indian/Asian	0	0%	0	0%	0	0%	0	0%	0
Coloured	12	5%	41	17%	17	7%	11	5%	81
15-24	37	15%	28	12%	30	13%	27	11%	122
25-34	71	30%	54	23%	67	28%	57	24%	249
35-44	61	25%	73	30%	68	28%	55	23%	257
45-54	30	13%	39	16%	27	11%	41	17%	137
55-64	25	10%	25	10%	26	11%	29	12%	105
65-74	10	4%	19	8%	17	7%	22	9%	68
75+	6	3%	2	1%	5	2%	9	4%	22

Sample Profile [Gauteng]

	January to December 2025 [Unweighted Data]								Total
	Jan – Mar '25	%	Apr – Jun '25	%	Jul – Sept '25	%	Oct – Dec '25	%	
Total	1 336	25%	1 344	25%	1336	25%	1344	25%	5 360
Female	707	53%	669	50%	684	51%	688	51%	2 748
Male	629	47%	675	50%	652	49%	656	49%	2 612
Black	1 071	80%	1 007	75%	1027	77%	1042	78%	4 147
White	90	7%	120	9%	136	10%	160	12%	506
Indian/Asian	28	2%	11	1%	15	1%	41	3%	95
Coloured	147	11%	206	15%	158	12%	101	8%	612
15-24	260	20%	271	20%	346	26%	313	23%	1190
25-34	348	26%	430	32%	370	28%	347	26%	1495
35-44	291	22%	317	24%	321	24%	314	23%	1243
45-54	199	15%	158	12%	154	12%	173	13%	684
55-64	138	10%	97	7%	90	7%	106	8%	431
65-74	67	5%	52	4%	43	3%	64	5%	226
75+	33	2%	19	1%	12	1%	27	2%	91

Sample Profile [KwaZulu-Natal]

	January to December 2025 [Unweighted Data]								Total
	Jan – Mar '25	%	Apr – Jun '25	%	Jul – Sept '25	%	Oct – Dec '25	%	
Total	944	25%	936	25%	952	25%	944	25%	3 776
Female	488	52%	478	51%	481	51%	493	52%	1 940
Male	456	48%	458	49%	471	49%	451	48%	1 836
Black	742	79%	698	75%	725	76%	735	78%	2 900
White	42	4%	70	7%	109	11%	39	4%	260
Indian/Asian	140	15%	136	15%	95	10%	143	15%	514
Coloured	20	2%	32	3%	23	2%	27	3%	102
15-24	145	15%	121	13%	152	16%	172	18%	590
25-34	299	32%	282	30%	276	29%	285	30%	1 142
35-44	218	23%	222	24%	245	26%	219	23%	904
45-54	107	11%	129	14%	111	12%	117	12%	464
55-64	94	10%	99	11%	82	9%	85	9%	360
65-74	66	7%	60	6%	68	7%	54	6%	248
75+	15	2%	23	2%	18	2%	12	1%	68

Sample Profile [Limpopo]

	January to December 2025 [Unweighted Data]								Total
	Jan – Mar '25	%	Apr – Jun '25	%	Jul – Sept '25	%	Oct – Dec '25	%	
Total	472	25%	472	25%	464	25%	464	25%	1 872
Female	237	50%	233	49%	232	50%	233	50%	935
Male	235	50%	239	51%	232	50%	231	50%	937
Black	453	96%	444	94%	443	95%	425	92%	1 765
White	19	4%	28	6%	21	5%	39	8%	107
Indian/Asian	0	0%	0	0%	0	0%	0	0%	0
Coloured	0	0%	0	0%	0	0%	0	0%	0
15-24	77	16%	92	19%	119	26%	98	21%	386
25-34	131	28%	131	28%	137	30%	120	26%	519
35-44	134	28%	108	23%	99	21%	115	25%	456
45-54	76	16%	71	15%	52	11%	59	13%	258
55-64	36	8%	31	7%	35	8%	40	9%	142
65-74	14	3%	29	6%	20	4%	25	5%	88
75+	4	1%	10	2%	2	0%	7	2%	23

Sample Profile [Mpumalanga]

	January to December 2025 [Unweighted Data]								Total
	Jan – Mar '25	%	Apr – Jun '25	%	Jul – Sept '25	%	Oct – Dec '25	%	
Total	400	25%	400	25%	392	25%	392	25%	1 584
Female	203	51%	208	52%	207	53%	186	47%	804
Male	197	49%	192	48%	185	47%	206	53%	780
Black	388	97%	380	95%	371	95%	363	93%	1 502
White	11	3%	20	5%	21	5%	27	7%	79
Indian/Asian	0	0%	0	0%	0	0%	1	0%	1
Coloured	1	0%	0	0%	0	0%	1	0%	2
15-24	90	22%	49	12%	79	20%	71	18%	289
25-34	107	27%	110	28%	106	27%	111	28%	434
35-44	90	22%	107	27%	113	29%	115	29%	425
45-54	54	14%	69	17%	49	13%	43	11%	215
55-64	28	7%	36	9%	26	7%	30	8%	120
65-74	22	6%	21	5%	15	4%	17	4%	75
75+	9	2%	8	2%	4	1%	5	1%	26

Sample Profile [Northern Cape]

	January to December 2025 [Unweighted Data]								Total
	Jan – Mar '25	%	Apr – Jun '25	%	Jul – Sept '25	%	Oct – Dec '25	%	
Total	104	25%	112	26%	104	25%	104	25%	424
Female	55	53%	57	51%	53	51%	51	49%	216
Male	49	47%	55	49%	51	49%	53	51%	208
Black	39	37%	49	44%	52	50%	40	38%	180
White	10	10%	12	11%	3	3%	0	0%	25
Indian/Asian	0	0%	0	0%	0	0%	0	0%	0
Coloured	55	53%	51	45%	49	47%	64	62%	219
15-24	23	22%	11	10%	13	13%	21	20%	68
25-34	36	35%	28	25%	25	24%	27	26%	116
35-44	20	19%	32	29%	30	29%	28	27%	110
45-54	6	6%	21	19%	18	17%	16	15%	61
55-64	9	9%	13	12%	12	12%	8	8%	42
65-74	7	7%	6	5%	6	6%	3	3%	22
75+	3	3%	1	1%	0	0%	1	1%	5

Sample Profile [North West]

	January to December 2025 [Unweighted Data]								Total
	Jan – Mar '25	%	Apr – Jun '25	%	Jul – Sept '25	%	Oct – Dec '25	%	
Total	328	25%	320	24%	336	26%	328	25%	1 312
Female	168	51%	166	52%	166	49%	161	49%	661
Male	160	49%	154	48%	170	51%	167	51%	651
Black	296	90%	300	94%	291	87%	292	89%	1 179
White	26	8%	15	5%	33	10%	22	7%	96
Indian/Asian	0	0%	0	0%	4	1%	5	2%	9
Coloured	6	2%	5	2%	8	2%	9	3%	28
15-24	48	15%	44	14%	54	16%	39	12%	185
25-34	93	28%	80	25%	86	26%	76	23%	335
35-44	83	25%	88	28%	82	24%	64	20%	317
45-54	45	14%	52	16%	51	15%	63	19%	211
55-64	43	13%	30	9%	36	11%	42	13%	151
65-74	12	4%	17	5%	21	6%	35	11%	85
75+	4	1%	9	3%	6	2%	9	3%	28

Sample Profile [Western Cape]

	January to December 2025 [Unweighted Data]								Total
	Jan – Mar '25	%	Apr – Jun '25	%	Jul – Sept '25	%	Oct – Dec '25	%	
Total	640	25%	632	25%	640	25%	640	25%	2 552
Female	381	60%	320	51%	324	51%	339	53%	1 364
Male	259	40%	312	49%	316	49%	301	47%	1 188
Black	256	40%	208	33%	272	43%	234	37%	970
White	126	20%	198	31%	220	34%	101	16%	645
Indian/Asian	3	0%	0	0%	0	0%	0	0%	3
Coloured	255	40%	226	36%	148	23%	305	48%	934
15-24	162	25%	192	30%	171	27%	152	24%	677
25-34	183	29%	171	27%	206	32%	185	29%	745
35-44	114	18%	127	20%	148	23%	146	23%	535
45-54	78	12%	67	11%	65	10%	81	13%	291
55-64	72	11%	51	8%	27	4%	51	8%	201
65-74	23	4%	21	3%	17	3%	22	3%	83
75+	8	1%	3	1%	6	1%	3	0%	20

Achieved Sample: Interviews

Province	18 January – 9 December 2025		
	Target Sample 	Achieved Sample 	Variance 
Eastern Cape	2 160	2 160	0%
Free State	960	960	0%
Gauteng	5 360	5 360	0%
KwaZulu-Natal	3 776	3 776	0%
Limpopo	1 872	1 872	0%
Mpumalanga	1 584	1 584	0%
North West	1 312	1 312	0%
Northern Cape	424	424	0%
Western Cape	2 552	2 552	0%
Total	20 000	20 000	

There was no variance between the target and achieved sample proportions for any of the provinces. Note that the variance is obtained as follows: For example, for Eastern Cape: Achieved sample % - Target sample % = $\left[\frac{2160}{20000} - \frac{2160}{20000}\right] \times 100\%$.

Achieved Sample: Fully Completed Leave-Behind Questionnaires

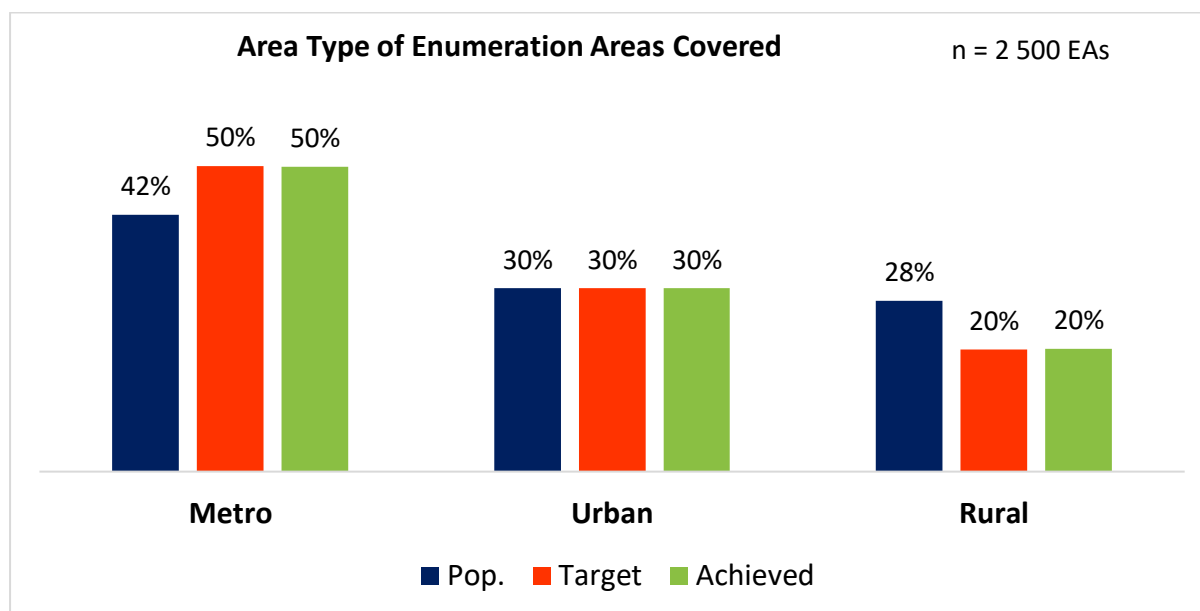
Province	18 January – 9 December 2025				
	Target 	No. of Paper Leave-Behind Questionnaires Collected and Processed 	No. of Online Leave-Behind Questionnaires Submitted 	Total No. of Leave-Behind Questionnaires Collected 	Deficit (%) 
Eastern Cape	1 080	875	26	901	-17.00%
Free State	480	498	56	554	-
Gauteng	2 680	2 571	190	2 761	-
KwaZulu-Natal	1 888	2 080	207	2 287	-
Limpopo	936	1 031	62	1 093	-
Mpumalanga	792	861	49	910	-
North West	656	685	78	763	-
Northern Cape	212	219	13	232	-
Western Cape	1 276	1 227	121	1 348	-
Total	10 000	10 047	802	10 849	

Respondents who opted to complete the online leave-behind questionnaires were presented with two split versions: one focused on product usage/purchase/consumption and the other on consumer behaviour and activities. Respondents were asked to complete both versions; some completed both, while others completed only one. As shown in the table above, 802 respondents completed both versions, while 632 completed only one version, as reflected in the table below. Of these, 357 completed the product-based leave-behind split and 275 completed the consumer behaviour-based leave-behind split.

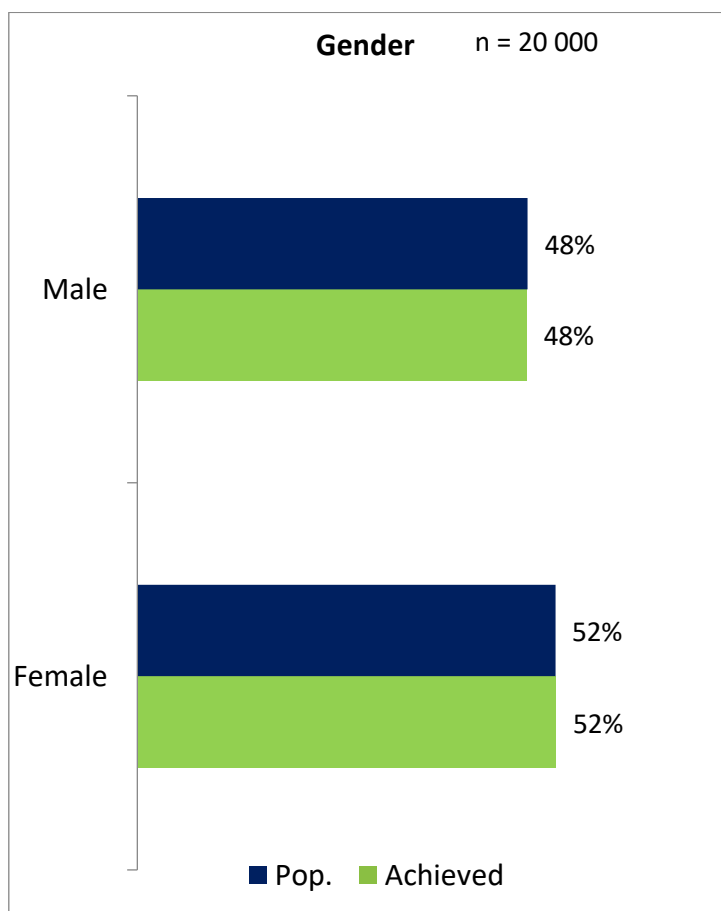
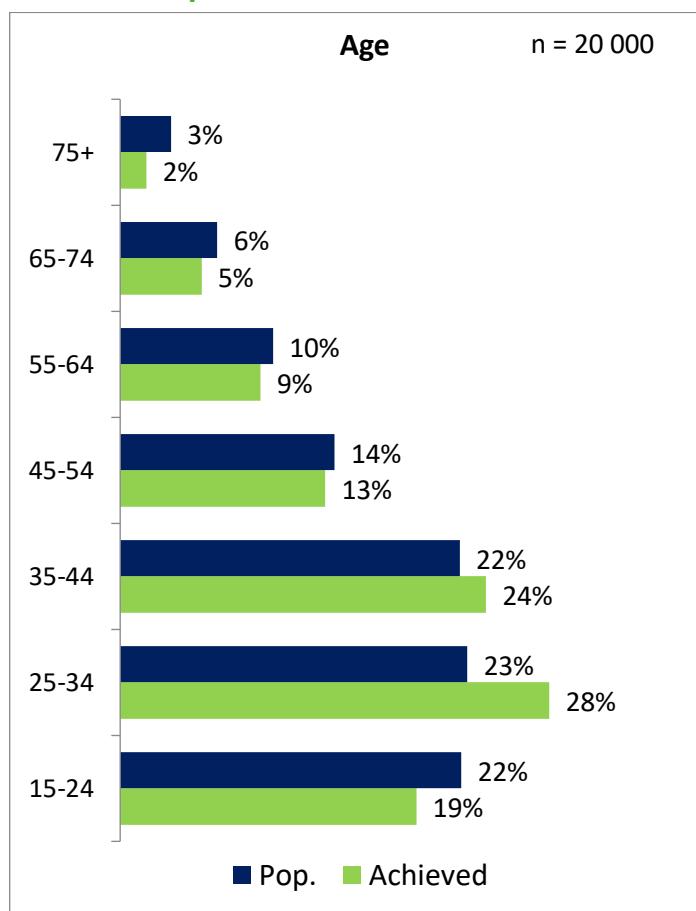
Achieved Sample: Online Split Leave-Behind Questionnaires

Province	18 January – 9 December 2025		
	No. of Online Product-Based Leave-Behind Questionnaire Splits Submitted 	No. of Online Consumer Behaviour-Based Leave-Behind Questionnaire Splits Submitted 	Total No. of Online Leave-Behind Questionnaire Splits Processed 
Eastern Cape	30	29	59
Free State	16	15	31
Gauteng	85	42	127
KwaZulu-Natal	106	59	165
Limpopo	39	30	69
Mpumalanga	20	32	52
North West	13	12	25
Northern Cape	8	2	10
Western Cape	40	54	94
Total	357	275	632

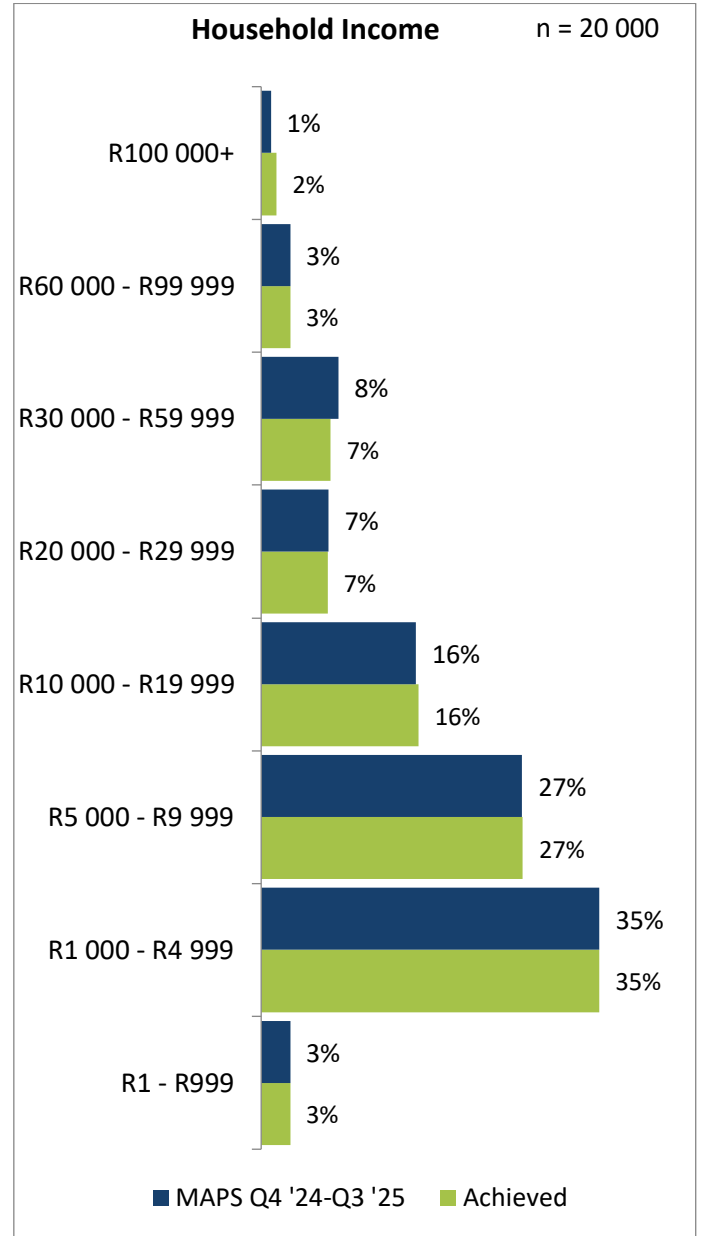
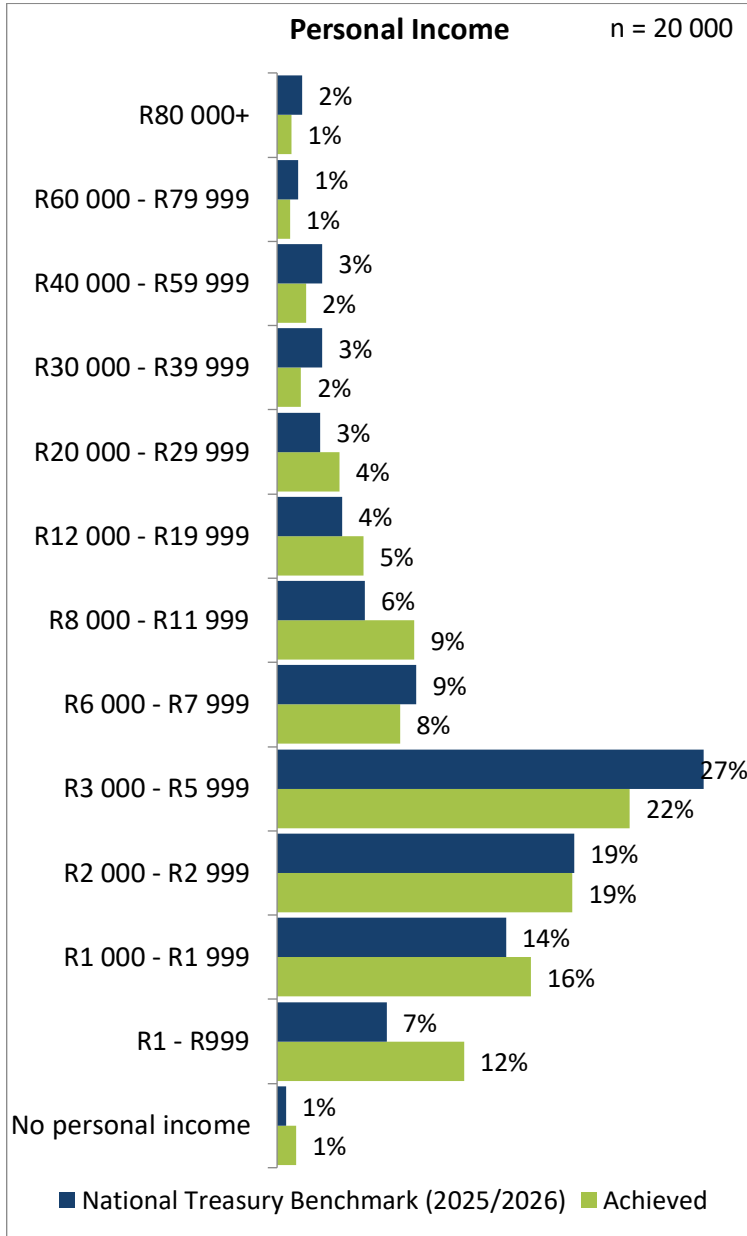
Area Distribution

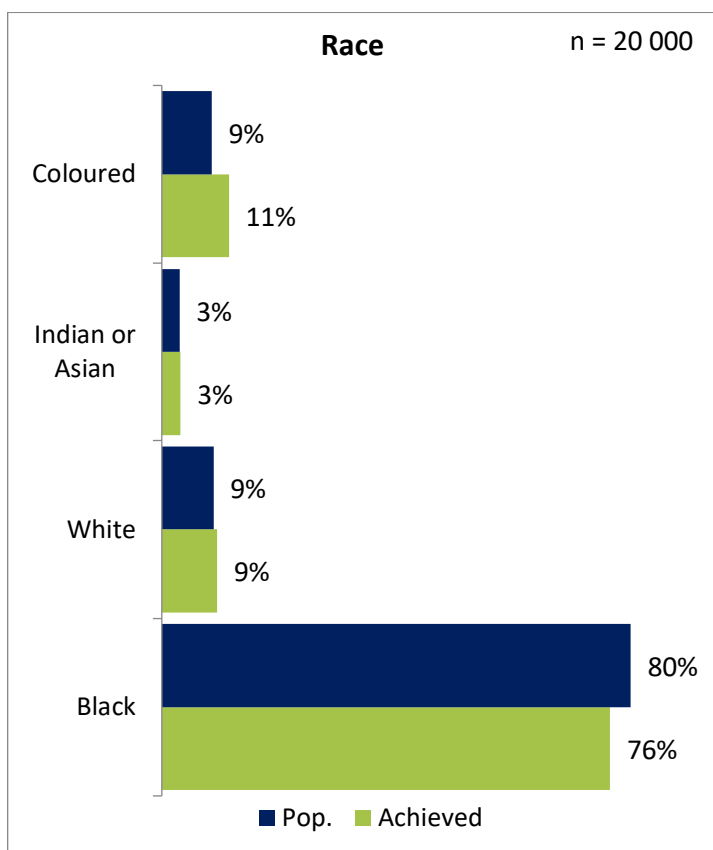
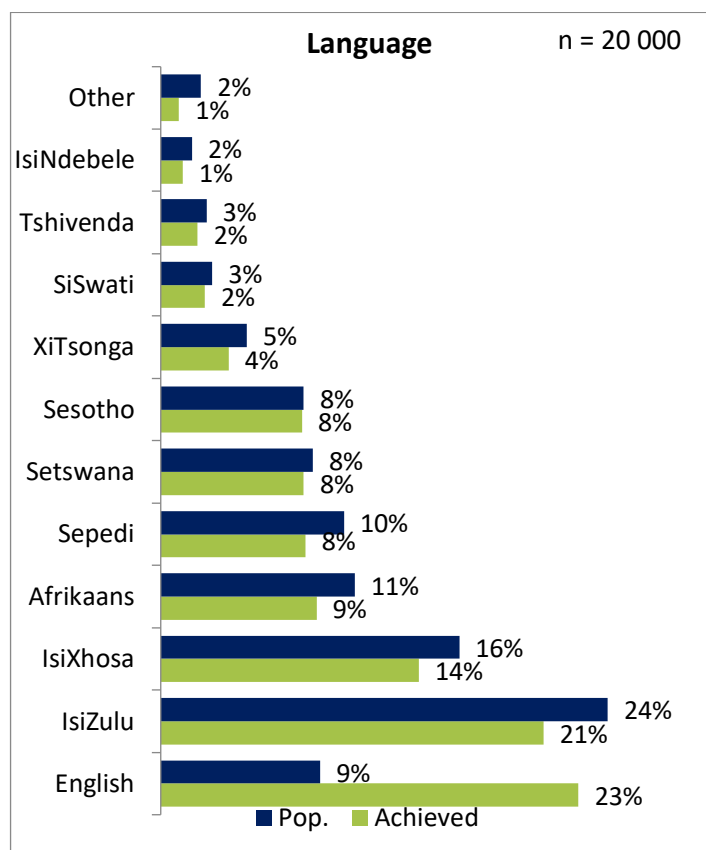


Respondent Profiles

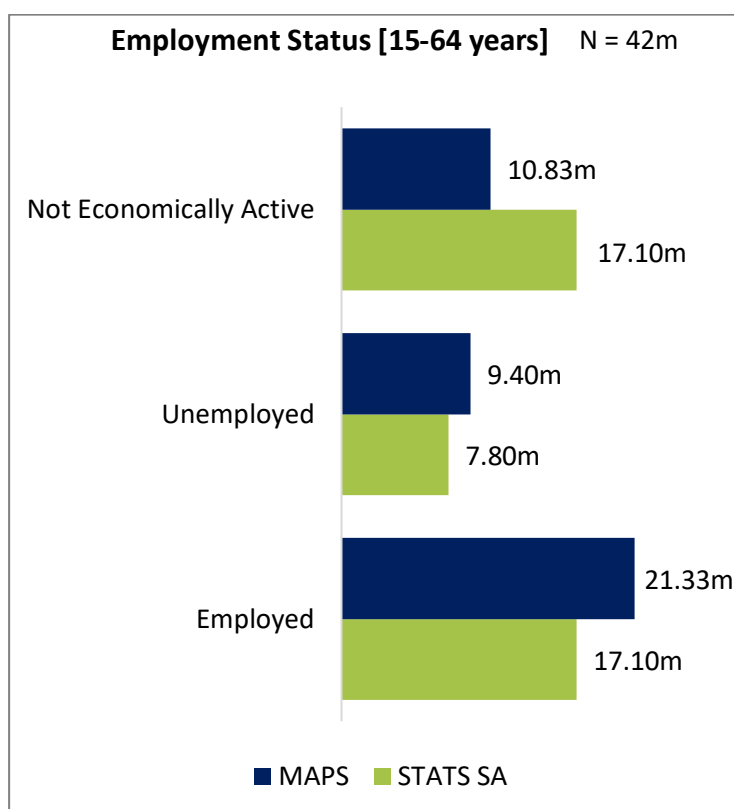
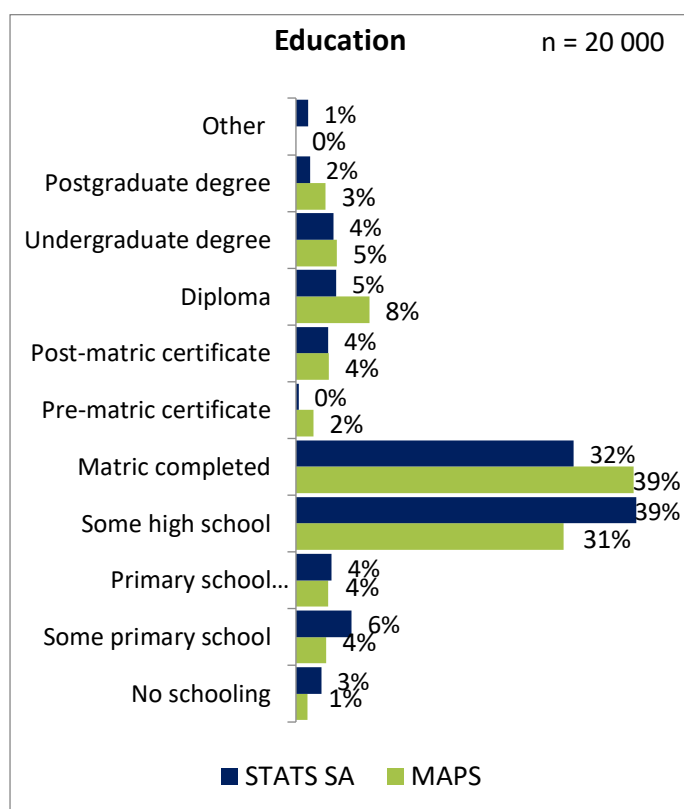


Source: Statistics South Africa 2025 Mid-year Estimates [15+ years]





Source: Statistics South Africa Census 2022
[Language Most Spoken in Household: Household members aged 1 and above]



Source: STATS SA QLFS Q4 2025



MARKETING RESEARCH
FOUNDATION

Section C:

Fieldwork

PLUS 94
RESEARCH

Section C: Fieldwork

7.0 Fieldwork

The Interview

In the event of a multi-household interview point, the Kish Grid is utilised to determine which household will be interviewed. After selection of the household to be interviewed is made, the number of adult males or females in the household who are 15 years and older is determined to enable random selection of the individual to be interviewed; the Kish Grid is once again utilised to randomly select this individual. Once the interview is completed, respondents are asked to complete a self-completion/leave-behind questionnaire.

In rural areas, interviewers with knowledge of the language and customs of the local population are used and arrangements are made with the chief/headman in charge before work commences.

Two research instruments were used for the MAPS® study:

1. Face-to-face questionnaire; and
2. Leave-behind questionnaire.

The average interview length for the face-to-face questionnaire was between 55 and 60 minutes. Respondents were given between three and five days to fill in the leave-behind questionnaire. Tablet-assisted personal interviewing (TAPI) was utilised for the face-to-face interviews, whereas paper-assisted personal interviewing (PAPI) and computer-assisted web interviewing (CAWI) methods were employed for the leave-behind questionnaire.

Both the questionnaires are provided in the Appendix of this technical report.

Fieldwork Summary

Fieldwork for the MAPS® January – December 2025 study began on the 18th of January 2025 and came to an end on the 9th of December 2025.

Q1 2025 – Q4 2025 Fieldwork Timeline



The specific start and end dates of MAPS® January – December 2025 are shown below:

18 January – 9 December 2025	
Quarter	Period
Q1 2025	18 January – 12 April 2025
Q2 2025	3 April – 27 June 2025
Q3 2025	4 July – 28 September 2025
Q4 2025	23 September – 9 December 2025

MAPS® January – December 2025 Timeline

Consideration Area	Summary
Sampling, Weighting, and General Consumer Behaviour	The achieved sample was composed of 50% metro, 30% urban, and 20% rural enumeration areas in line with the set area type target for the MAPS® study between January and December 2025. There were minor differences between the target population and the sample proportions achieved for all the age groups except for the 25-34 group, which was overrepresented by 6% at a national level. Whites and Indians/Asians were adequately represented whereas Blacks were underrepresented by 4% and Coloureds overrepresented by 2%. Seven provinces (Eastern Cape, Free State, KwaZulu-Natal, Limpopo, Mpumalanga, Northern Cape, and North West) fell short of the 15-24 group by at least 4%. Millennials and Generation Z respondents comprised slightly over 70% of the achieved sample. Most of the respondents (39%) that took part in the survey have the matric certificate as their highest qualification. Females and males were relatively well represented across all the provinces. Below are a few quarter-on-quarter unweighted results of the sample achieved in 2025 on general consumer behaviour/patterns.

Variable	Q1 2025	Q2 2025	Q3 2025	Q4 2025
Proportion of households with fibre internet	18%	21%	26%	27%
Average gross monthly household income	R13 738.83	R15 200.36	R15 249.32	R15 511.24
Average gross monthly personal income	R7 140.54	R8 429.12	R8 691.39	R8 321.38
Proportion of households with at least one car	27%	28%	28%	30%
Proportion of bank account holders	76%	79%	82%	80%
Newspaper audience in the past 3 months	21%	18%	15%	16%
Television audience in the past 4 weeks	57%	51%	52%	49%
Radio audience in the past 4 weeks	43%	39%	38%	40%

The expected minimum individual efficiency is 70% and MAPS® achieved 75% in that regard for the January – December 2025 fieldwork period. There was a slight decline of 1% when compared to the weighting efficiency statistic obtained for the previous annual release. All the provinces achieved a weighting efficiency statistic of at least 70% except for the Eastern Cape (61%), Free State (65%), and KwaZulu-Natal (60%). The data weighting process for the MAPS® January – December 2025 release was based on Stats SA's 2024 mid-year population estimates.

Data Collected and Questionnaire Changes

A total of 228 fieldworkers took part in the data collection process and gathered a total of 20 000 face-to-face interviews spread across 2 500 enumeration areas in all the provinces. A total of 10 849 respondents successfully completed a full leave-behind questionnaire via a paper-based format and online (10 047 were on paper and 802 were online). Online split leave-behind questionnaires were made use of for the first time during the third quarter of 2025 to address the issue of a lengthy interview duration. A total of 632 online split leave-behind questionnaires were completed online across all provinces during the second half of 2025. There were two online split questionnaires (one was focused on product usage/purchase/consumption, and the other was related to consumer behaviour and activities). All the provinces except for the Eastern Cape achieved their set targets of the full leave-behind questionnaire.

The Eastern Cape main field learnings revolved around:

1. Unexpectedly high rates of non-completion of self-administered questionnaires;
2. The incidence of some known crime hotspots which restricted area revisits, especially in the evenings; and
3. Unusually high distances in between EAs for re-visits impacted timelines and the revisit success rate.

A total of 905 paper leave-behind questionnaires were discarded across 12 months from January to December 2025, nationwide as they were not consistent with the minimum standards set out in the data collection charter. Discards allow the research to maintain the highest possible quality standards, as well as providing opportunities for continuous refresher training throughout the data collection ecosystem.

Questionnaire changes were forwarded for compilation to Plus 94 Research by various MAPS® stakeholders through the Marketing Research Foundation (MRF) in preparation for 2026 fieldwork. Approval for the implementation of the questionnaire changes was sought from the MRF and its research committee through numerous meeting sessions that occurred in Q4 2025.

Field Quality Control Checks	The following field quality control procedures were implemented: Back-checks: Back-checks are the most important quality control feature of any survey. A proportion of 23% of the completed face-to-face interviews (4 674 out of 20 000 interviews) were telephonically back-checked during the MAPS® January – December 2025 fieldwork period. Cases that underwent back-checks were randomly selected and at least 20% of each fieldworker's submitted interviews were validated. The telephonic back-check responses were compared against the original responses for multiple variables to determine if there were any discrepancies. In addition, the respondents were asked to rate their overall survey experience and asked if the Plus 94 Research interviewers conducted themselves in a professional manner during the interview. The average interview length of a telephonic back-check was approximately five minutes. At least 15% of the interviews were physically back-checked by well trained, experienced, and reliable field supervisors. A team of data quality checkers regularly listened to recorded back-checks to establish the authenticity of the interview, the way in which the interview was conducted, and the professionalism of the interviewer. Interviewer Kish Grid compliance was assessed through all three types of back-checks (viz., physical, telephonic, and recordings). Checking of captured GPS co-ordinates: Captured GPS co-ordinates were monitored and verified on a regular basis. The captured GPS co-ordinates are compared against the pre-specified visiting points provided on enumeration MAPS®. Interviews with GPS co-ordinates that were more than 600m away from the pre-specified points were discarded. Paper self-completion questionnaire quality assurance: All paper leave-behind questionnaire respondents were contacted to ensure that there was no falsification of data by the fieldworkers. The calls from the Plus 94 Research team also confirmed if the Kish Grid-selected household member who took part in the face-to-face interview was the same individual who went on to fill in the self-completion questionnaire. In addition, the call confirmed the contact details for the processing of respondent incentives. Any leave-behind questionnaire that did not meet the set data quality standards with respect to completeness, consistency, and accuracy was discarded.
Interviewer Training	Interviewer training and debriefing sessions remain a fundamental part of the MAPS® study as it helps to ensure data quality, consistency, and reliability, as well as promoting ethical and effective data collection practices. A total of 25 new interviewers were recruited and trained during the second half of 2025 to replenish fieldwork teams. The details of the training workshops are as follows: 1. Gauteng and Limpopo: 12th to 13th of August 2025 [9 interviewers] 2. Western Cape: 9th to 10th of September 2025 [6 interviewers] 3. Free State and Mpumalanga: 29th to 30th of September 2025 [10 interviewers]
Missing Information	Between July and December 2025, 4.5% of the respondents refused to provide either their household income or personal income as they deemed this type of question to be of a sensitive nature, while 19.5% of the respondents mentioned that they did not have knowledge of their household income. The proportion of respondents who were not aware of their household income fluctuated between 18% and 23% quarter on quarter in 2025. Data imputation was implemented to help close this gap. Variables that were chosen for the imputation process include broader income band questions, age, area, employment status, highest level of education, LSM and SEM, and SASSA income. All the respondents were comfortable with specifying their age, race, and gender.

Major Challenges Experienced in Field	1. Excessive rainfall was experienced in various provinces and this to some extent slowed down fieldwork. 2. Fieldwork was postponed in five Western Cape EAs located in Mitchells Plain, Matroosfontein, and Valhalla Park due to gang-related shootings. Interviewers had to tread carefully in several townships in the Eastern Cape, Gauteng, KwaZulu-Natal, and Western Cape due to drug addicts and gangsters who posed a risk to them. Some community members and leaders (e.g., ward councillors) in certain areas in East London, Port Elizabeth, Durban, Pretoria, Johannesburg, and Cape Town either volunteered to accompany them until they finished their interviews or warned them to be extra careful. 3. Poor road infrastructure proved a problem across all the provinces, mainly in urban informal settlements and rural areas. There was occasional need for fieldworkers to complete some of the distances on foot so that they could reach pre-specified households for the survey in Eastern Cape, Free State, Gauteng, KwaZulu-Natal, Northern Cape, North West, Limpopo, and Mpumalanga. 4. Skepticism of potential respondents due to frequent scams in their communities (this was experienced in all the provinces). 5. Hostile community members and security personnel in all the provinces. 6. There were dangerous wild animals roaming in residential areas that posed a risk to fieldworkers in KwaZulu-Natal (Hibiscus Coast, Ugu). 7. Poor network coverage in some parts of Gauteng, KwaZulu-Natal, Limpopo, Mpumalanga, and Western Cape (mainly in informal settlements and rural areas).
--	---

Substitution

In cases where the selected respondent was unavailable, even after a total of three visits at different times of the day, substitution of the interview point would occur. In order to reduce substitution rates, the interviewer would take the contact details of the selected respondent in a household and phone to make an appointment. The interview would be scheduled at a time that best suited the respondent. Each household replacement/substitution was approved by field supervisors in order to avoid interviewer bias. The project manager was responsible for approving all EA replacements. Each interviewer's work was analysed for any patterns in the number of refusals and successful interviews. The substitution details for the MAPS® January – December 2025 survey are shown below:

Reason for Replacement	Number of Households
Refused	1 164
House inaccessible (gated communities and farms)	190
Nobody home (after three call-backs)	199
EA inaccessible	2 288 (286 EAs)
Other	93
Total	3 934

The overall household substitution rate stood at 20% for the MAPS® January – December 2025 survey. The tables below unpack the replacement reasons and demographic characteristics of the 286 EAs across all nine provinces:

Province	Reason for EA Substitution								Total
	Access denied (Estate)	Access denied (Farm)	Non-residential EA	No longer inhabited	EA refusal	Area very unsafe	Poor road infrastructure	Language barrier	
Eastern Cape	9	0	6	4	13	8	6	0	46
Free State	1	4	0	1	5	0	0	0	11
Gauteng	49	6	5	2	21	22	0	0	105
KwaZulu-Natal	22	1	0	0	15	6	2	1	47
Limpopo	3	5	1	0	1	0	0	0	10
Mpumalanga	2	3	0	0	12	0	0	0	17
North West	3	1	0	2	3	0	0	0	9
Northern Cape	1	1	0	0	4	0	0	0	6
Western Cape	17	9	1	0	2	5	1	0	35
Total	107	30	13	9	76	41	9	1	286

Province	Dominant Race of Substituted EAs	Demographic Summary
Eastern Cape	25 black, 11 white, 10 coloured	Race composition of substituted EAs: Black (58%), White (21%), Coloured (14%), Indian/Asian (7%) Area type of substituted EAs: Metro (62%), Rural (13%), Urban (25%)
Free State	7 black, 4 white	
Gauteng	82 black, 19 white, 4 coloured	
KwaZulu-Natal	23 black, 3 white, 21 Indian/Asian	
Limpopo	7 black, 3 white	
Mpumalanga	12 black, 5 white	
North West	4 black, 5 white	
Northern Cape	1 white, 5 coloured	
Western Cape	5 black, 9 white, 21 coloured	
Total	286 EAs	

Back-checking

Slightly over a fifth of each interviewer's work was back-checked to verify the quality and legitimacy of key data collected for the MAPS® study. Throughout the duration of the fieldwork, the Plus 94 Research call centre-based back-check team returns to a randomly chosen sub-sample of respondents.

A smaller set of questions from the face-to-face questionnaire is used for the back-check survey. The back-checking exercise enables Plus 94 Research to modify certain aspects of the data collection process in order to improve data quality. A total of **4 674** respondents (23% of the sample achieved) confirmed that the interviews had taken place and the information provided was correct.



MARKETING RESEARCH
FOUNDATION

Section D:

Analysis and Results

PLUS 94
RESEARCH

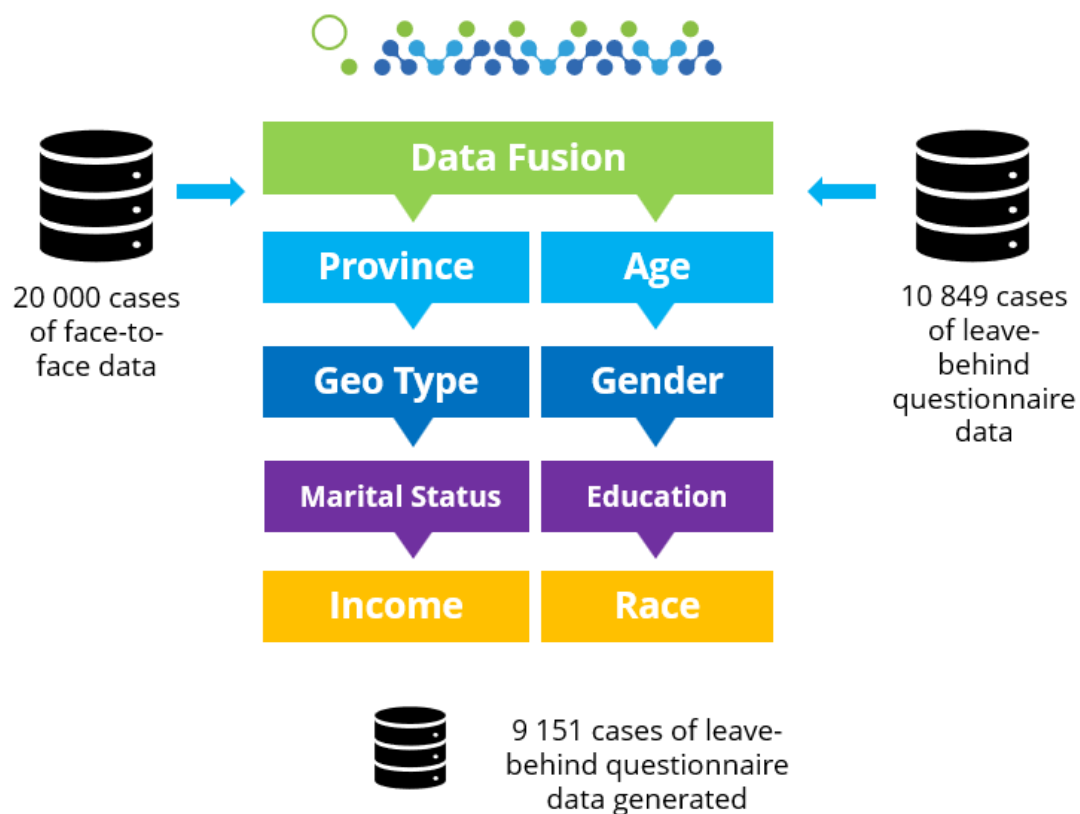
Section D: Analysis and Results

8.0 Analysis and Results

Data analysts, processors, and project managers constantly scrutinised and cleaned the data collected to ensure the integrity of the data and results.

Data Fusion

All 20 000 respondents completed a face-to-face questionnaire. Half of them were expected to complete the leave-behind questionnaire; a total of 10 849 respondents successfully completed the leave-behind questionnaire. For the 9 151 respondents who did not, their data was obtained through integration of the face-to-face interview data with the leave-behind questionnaire data. A number of hooks were considered in fusing data; these included behavioural, but most were demographic variables.



9.0 Segmentation

Segmentation tools assist in grouping together “like” people in order to establish a brand’s relative potential in the marketplace. They enable the marketing and advertising industries to trend changes in the identified segments over time. The MAPS® study offers a number of market segmentation tools in the analysis of the collected data. These are the living standards measure (LSM), socio-economic measure (SEM), consumer market segmentation, generations, and life stages.

Socio-Economic Measure (SEM)

The Publisher Research Council and the Broadcast Research Council of South Africa have developed and co-own the Establishment Survey SEM™ segmentation model. The SEM 2018 algorithm, where each respondent is assigned a score that ranges from 0 to 100, was used to define the SEM segmentation. Ten segments were developed based on the input variables shown below:

Variable no.	Attribute	MAPS® question no.
1	Built-in kitchen sink	H8
2	Tap water inside your home, or store-bought water for use in your home	H6A
3	Hot running water from a geyser	H6
4	Flush toilet in/outside house	H7
5	Home security service	H12A
6	Motorcar	G1
7	Fridge or combined fridge/freezer	141a
8	Side-by-side fridge and freezer	141a
9	Deep freezer – free-standing	141a
10	Microwave oven	141a
11	Floor polisher or vacuum cleaner	141a
12	Washing machine	141a
13	Roof tiles or concrete roofing	P1
14	None, earth, or dung flooring	P2
15	Cement, concrete, or raw wood flooring	P2
16	Finished floor with parquet, carpet, tiles, or ceramic flooring	P2
17	None or one sleeping room	P3
18	Two sleeping rooms	P3
19	Three or more sleeping rooms	P3
20	A post office near where you live	P4
21	A police station near where you live	P4

Living Standards Measure (LSM)

“The SAARF LSM (living standards measure) divides the population into 10 LSM groups: 10 (highest) to 1 (lowest). It cuts across race and other outmoded techniques of categorising people, and instead groups people according to their living standards using criteria such as degree of urbanisation and ownership of cars and major appliances.” (*Source: www.saarf.co.za*)

The LSM indicator variables that were used in the analysis of MAPS® data are shown below:

Variable no.	Attribute	MAPS® question no.
1	Hot running water from a geyser	H6
2	Computer – desktop/laptop	FQ2
3	Electric stove	141a
4	Number of domestic workers or household helpers in household (this includes live-in and part-time domestics and gardeners)	R23
5	0 or 1 radio set in household	FQ2
6	Flush toilet in/outside house	H7
7	Motor vehicle in household	G1
8	Washing machine	141a
9	Refrigerator or combined fridge/freezer	141a
10	Vacuum cleaner/floor polisher	141a
11	Pay TV subscription	C3
12	Dishwashing machine	141a
13	Three or more cell phones in household	E1
14	Two cell phones in household	E1
15	Home security service	H12A
16	Deep freezer – free-standing	141a
17	Microwave oven	141a
18	Rural rest (excl. Western Cape and Gauteng rural)	*
19	House/cluster house/townhouse	H1
20	DVD player/Blu-ray player	141a
21	Tumble dryer	141a
22	Home theatre system	141a
23	Home telephone (excl. cell phone)	FQ3
24	Swimming pool	H14
25	Tap water in house/on plot	H6A
26	Built-in kitchen sink	H8
27	TV set	C1
28	Air conditioner (excl. fans)	141a
29	Metropolitan dweller (250 000+)	*

**By sample design*

Life Stages

The life stages used for MAPS® are adopted from the SAARF life stages. There are eight SAARF life stages, which are personal to the respondent and are determined by age, marital status, and whether dependent children in various age categories are living with them. A child has been defined as someone who is under 21. It should be noted that the classifications are not always linear as there can be parallel age paths. MAPS® has condensed two life stages (At-Home Singles and Young Independent Singles) into 'Young Singles' to end up with seven life stages [Young Singles, Mature Singles, Young Couples, Mature Couples, Young Families, Single-Parent Families, and Mature Families].

Generations

The generation segments are as per the Telmar Global Generations definition and the Pew Research generations definition. The Telmar Global generations segments are classified as follows:

1. Pre-Boomers: 1945-earlier;
2. Boomers: 1946-1964;

3. Generation X: 1965-1985;
4. Millennials (Gen Y): 1986-2005; and
5. Generation Z: 2006-present.

The Pew Research generation segments are classified as follows:

1. Silent: 1928-1945;
2. Boomers: 1946-1964;
3. Generation X: 1965-1980;
4. Millennials (Gen Y): 1981-1996; and
5. Generation Z: 1997-present.

Consumer Market Segmentation Tool

The Consumer Market Segmentation (CMS) tool was developed by the Bureau of Market Research, which is an independent market research entity within the University of South Africa. The CMS tool is based on five focus areas, and they are as follows:

Geographic

1. Province;
2. District;
3. Place name;
4. Metro/urban/rural;
5. Population density; and
6. Area.

Demographic

1. Age;
2. Gender;
3. Population group;
4. Marital status; and
5. Life course.

Socio-Economic

1. Qualification;
2. Employment;
3. Assets;
4. Income;
5. Occupation; and
6. Social class.

Psychographic

1. Lifestyle;
2. Personality; and
3. Interests.

Behavioural

1. Purchase occasion;
2. Benefits sought;
3. Customer loyalty level;
4. Attitude towards products and services;
5. Retail behaviour; and
6. Expenditure profile.

10.0 Confidence Levels

All sample survey results are, unavoidably, subject to a margin of error. How large this margin of error is depends principally on the size of the unweighted sample and, in the case of “yes/no” questions, (as comprise the majority of the MAPS® questionnaire), the unanimity of response – for a given sample size, the margin of error is larger, in absolute size, if 50% of people answer “yes” to a given question and 50% “no”, as opposed to if only one person in 10 says “yes”.

Contrary to widespread belief, the size of the margin of error is very little influenced, under certain conditions that generally apply in the MAPS® case, by the size of the population that the sample represents or by the proportion of that population who are interviewed.

In a sample survey the sample data is used to estimate on a scientific basis the values of “universe” parameters (e.g., readership). Information based on sample data may vary from sample to sample, which implies that an estimated value may deviate from the “true” (albeit unknown) universe value. The latter is the value that would have been obtained if the whole population had been surveyed using the same questionnaire and survey method. The difference between an estimated value and the corresponding true or universe value is referred to as the sample error. This sample error will vary from sample to sample, and this variation in the sample error is estimated by the so-called standard error of the estimate.

An interval around the estimated value can be calculated, which will contain the true (universe) value with a given degree of confidence. This interval is referred to as a confidence interval for the (unknown) universe value. The boundaries of a confidence interval are obtained by subtracting a certain quantity from the estimated value and by also adding this quantity to the estimated value. This quantity is called the precision of the estimate and is, for a given confidence coefficient, equal to the maximum value of the sample error as defined above. In other words, the size of a sample error of an estimate cannot exceed the precision of the estimate. The precision of an estimate is calculated as the product of a constant and the standard error, where the value of the constant is determined by the chosen confidence coefficient. For a confidence coefficient of 0.95 or 95% the precision = 1.96 times the standard error, and for a confidence coefficient of 0.99 or 99% the precision = 2.58 times the standard error.

If the estimated value as well as its standard error is known, the true or universe value will not differ from the estimated value by more than 1.96 (approximately twice) the value of the standard error, assuming a 95% confidence coefficient.

The chart overleaf allows the approximate calculation of the “95% confidence limits” of any percentage shown in the MAPS® reports. These confidence limits are such that there is only about one

chance in 20 of the true percentage lying outside the limits given by the reported percentage plus or minus the confidence limits.

To obtain the confidence limit for any percentage, lay a straight edge across the chart so that it joins the relevant unweighted sample size on the left-hand scale and the percentage of interest on the right-hand scale. The confidence limits can then be read off the central scale, at the point where the straight edge cuts it.

Example

Suppose MAPS® shows that, amongst men, the readership of a certain newspaper is 20% in Gauteng, with an unweighted sample size of 1 000 in this sub-group.

A straight edge laid across “1 000” on the left-hand scale and “20%” on the right-hand scale cuts the central scale at 3.5% approximately.

The 95% confidence limits of the readership level are thus 23.5% (i.e., 20% + 3.5%) and 16.5% (i.e., 20% - 3.5%). There is only about a one in 20 chance that the true (unknown) figure is either larger than 23.5% or smaller than 16.5%.

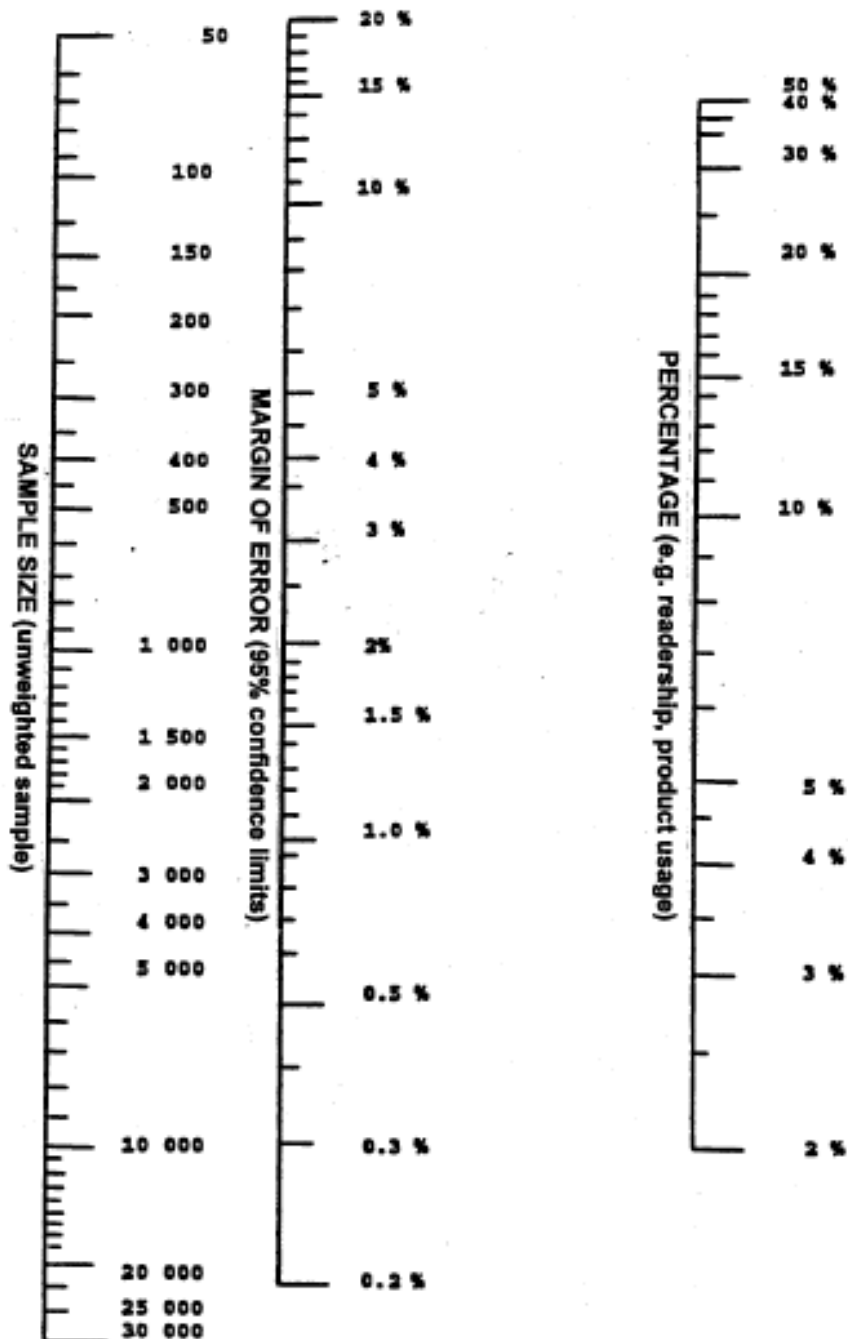
To obtain the confidence limits of the numbers of readers, multiply the results just obtained by the “estimated population” of the target group.

Continuing the previous illustration, if the table shows that the number of males in Gauteng is 920 000, then the 95% confidence limits of the readership of the publication would be 216 000 (23.5% of 920 000) and 152 000 (16.5% of 920 000), approximately.

Technical Note

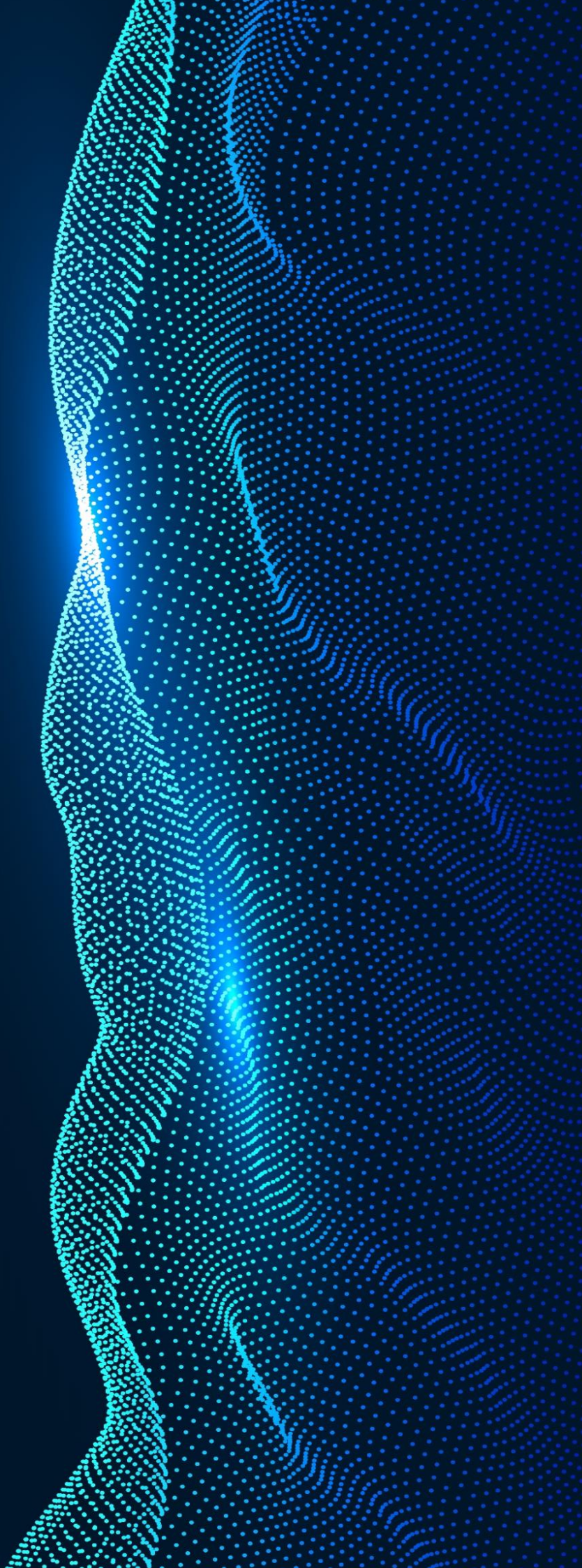
In view of the sample design employed for MAPS®, it is inappropriate to estimate confidence limits based on simple random sample assumptions. The nomogram has been constructed using a design factor of 1.25. Whilst experience and some calculations based on MAPS® data can support this figure, it may be exceeded when, for example, a variable is highly skewed in its population distribution; the confidence limits will then be wider. An upper limit of 2.0 for the design factor may be reasonably assumed, implying confidence limits 62.5% greater than those calculated from the nomogram in the worst case.

CONFIDENCE LIMITS



Section E:

Appendix



Section E: Appendix

11.0 MAPS® Research Instruments

In order to get access to the questionnaires that were used for the MAPS® January – December 2025 survey, please click on the link below:

<https://MAPS®.survey.co.za/tests/docs/>

11.1 Questionnaire Changes/Additions

MAPS® questionnaire changes/additions implemented between July 2020 and April 2025 may be accessed on the link below:

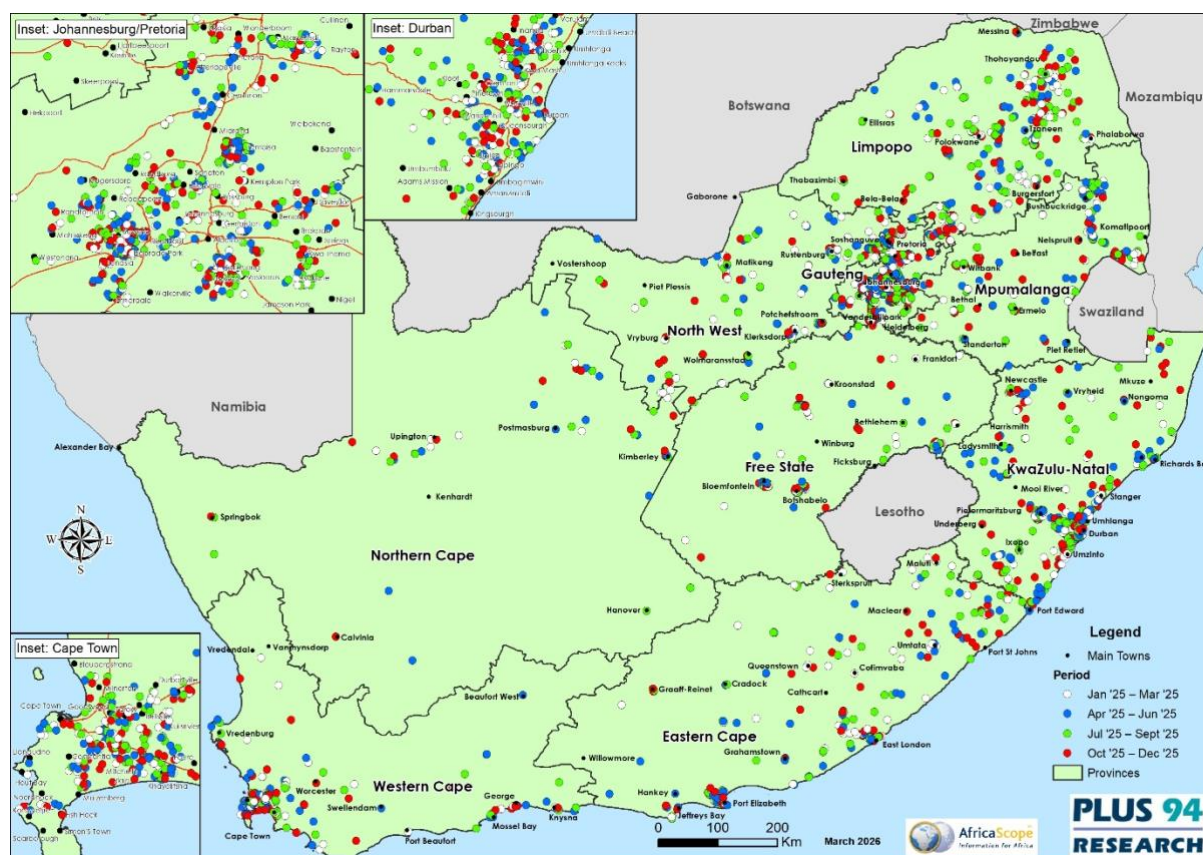
<https://MAPS®.survey.co.za/tests/questionnaire/>

11.2 Fieldwork Areas

Areas that were covered by the MAPS® survey may be accessed on the link below:

<https://MAPS®.survey.co.za/tests/areas/>

Below is the national map indicating the geographical spread of the areas that were covered:



11.3 Defining the Metropolitan Boundaries for MAPS®

BACKGROUND

In South Africa, there are eight metropolitan districts that serve as administrative regions encompassing major urban areas. These metropolitan districts play a crucial role in governing and managing the affairs of these densely populated cities. These areas also make a significant contribution to the economy of the country and consumption patterns in South Africa. The Municipal Demarcation Board has the responsibility of demarcating the boundaries of the metropolitan districts. These metropolitan districts are:

1. City of Johannesburg Metropolitan District;
2. City of Tshwane Metropolitan District;
3. Ekurhuleni Metropolitan District;
4. eThekweni Metropolitan District;
5. Nelson Mandela Bay Metropolitan District;
6. City of Cape Town Metropolitan District;
7. Mangaung Metropolitan District; and
8. Buffalo City Metropolitan District.

DEFINING THE URBAN CENTRES OF METROPOLITAN DISTRICTS

The definition of metropolitan areas in the MAPS® study differs from the official metropolitan municipality classification used by Statistics South Africa. According to MAPS® and AfricaScope, metropolitan areas are defined primarily on the basis of contiguous built-up urban development rather than on administrative or municipal boundaries. This means that only the continuously urbanised or densely built-up sections of a metro are classified as metropolitan areas within the study framework.

As a result, peri-urban, semi-rural, or rural areas that may fall within the official boundaries of a metropolitan municipality are excluded from the MAPS® metropolitan classification if they are not part of the continuous urban settlement pattern. The approach is intended to provide a more functionally urban definition of metro areas that better reflects population concentration, urban lifestyles, media access, and consumer behaviour patterns relevant to market research and audience measurement.

The eight metropolitan districts each have unique characteristics associated with them. Each of the metropolitan districts has large urban areas that are made up of both formal and informal residential areas. Part of these large urban areas include the commercial and industrial regions of the metropolitan district.

These metropolitan districts also have rural areas associated with them that include both commercial farmlands and traditional areas. For example, large parts of the eThekweni metropolitan district consist of traditional areas with relatively low population densities. Within the boundaries of the metropolitan districts there are also small towns (e.g., Bronkhorstspuit in the Tshwane Metropolitan District) that are discontinuous from the urban centre.

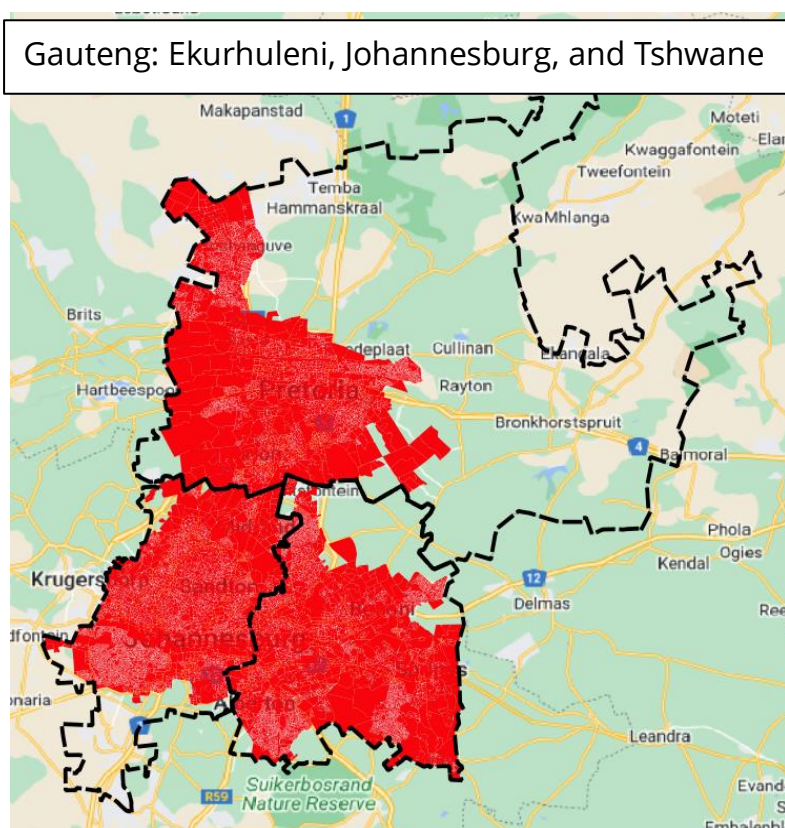
Several of the metropolitan districts have relatively small urban centres compared to their large rural areas. These non-urban areas within the metropolitan districts will have a distinctly different consumption pattern to that of the population living in the densely populated formal and informal

urban areas. Consequently, it was decided to identify in each of the metropolitan districts the areas that are truly the urban centres.

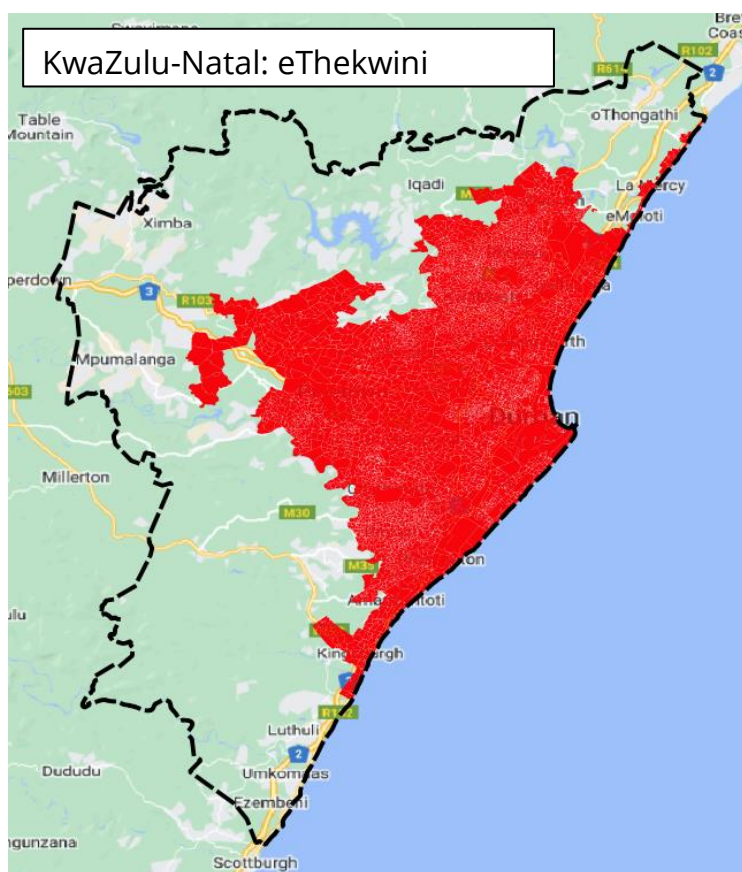
To accomplish this, the census enumeration areas from the 2011 census were used as a basis, which were classified in terms of the type of area. However, 12 years after the census, the types of areas in the metropolitan districts have changed. Therefore, the enumeration area boundaries were overlaid onto satellite imagery and changes in the type of areas were taken into consideration in defining the truly urban centres of the metropolitan district. Whenever possible, the urban centres of the metropolitan areas were defined as contiguous areas. However, it is only within the City of Cape Town that the urban centres are not contiguous.

The urban centres of each metropolitan district are depicted in the MAPS® below.

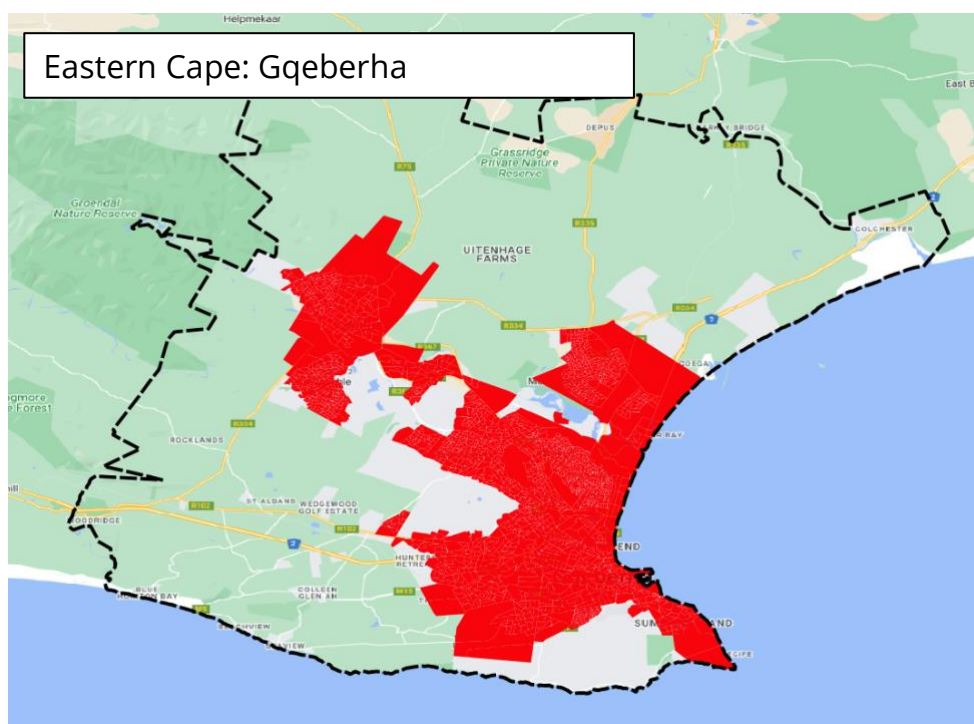
1. Ekurhuleni Metro, City of Johannesburg, and City of Tshwane Metropolitan District



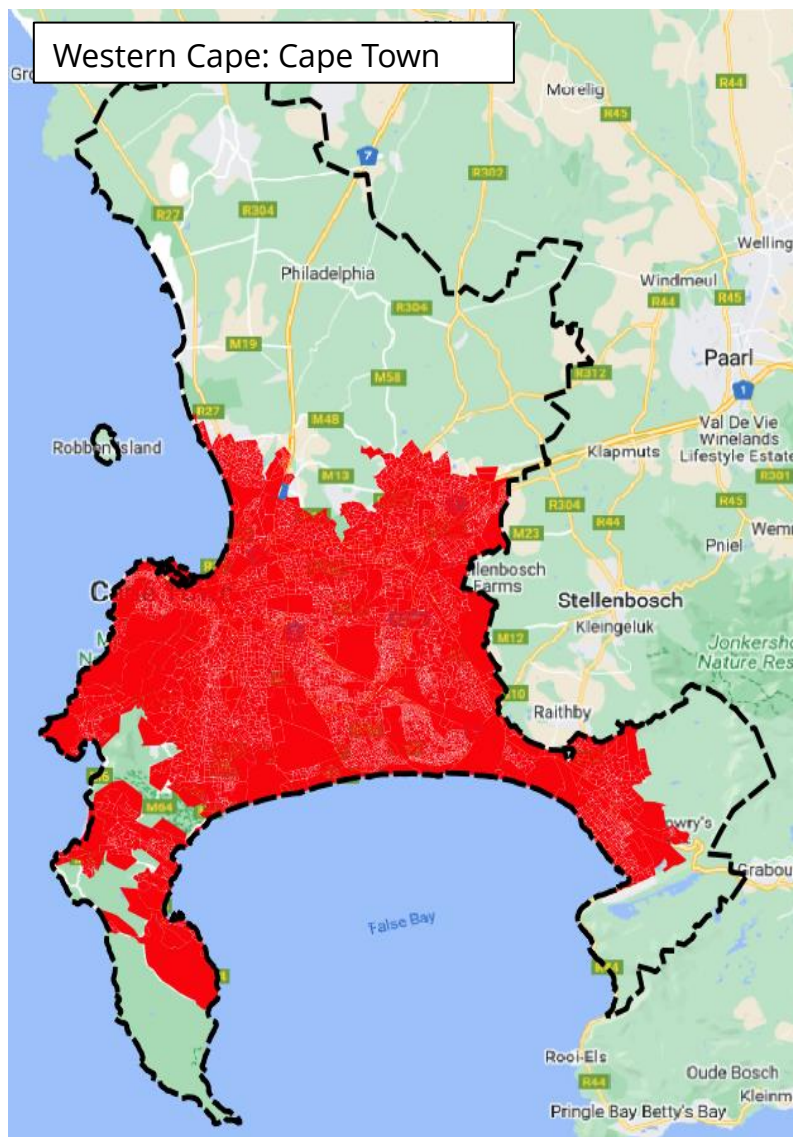
2. eThekweni Metropolitan District



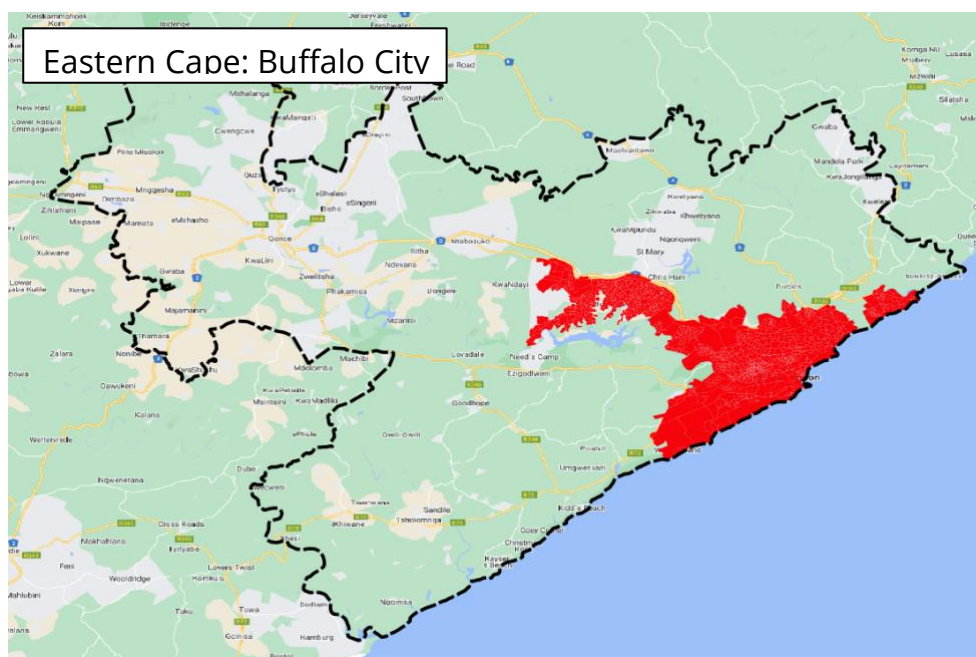
3. Nelson Mandela Bay Metropolitan District



4. City of Cape Town Metropolitan District



5. Buffalo City Metropolitan District





MARKETING RESEARCH
FOUNDATION

Thank you

PLUS 94
RESEARCH